

Community & Transportation Preferences Survey

U.S. Metro Areas, 2015

July 23, 2015



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Highlights: Generation gaps in everyday travel

- Only 71% of Millennials like driving (the lowest of any generation), while 83% of them like walking. This 12 point gap is wider than any other generation. The gap for Baby Boomers is 2 points.
- Millennials use transit much more than other generations (40% took transit in the last month compared to 28% for Gen X, 19% for Baby Boomers, and 8% for Silent Generation)
- Overall, Gen Xers bicycle the most, but Millennials bicycle the most for transportation. Gen X is most likely to bicycle only for exercise.
- Millennials are most likely to walk and bicycle for transportation, rather than for exercise.
- For all generations, not having destinations nearby is a major barrier to walking and bicycling more.

Highlights: Transportation policy priorities

- Maintaining and repairing roadways and bridges is the top transportation priority for metro area adults, with 83% indicating it's a high or extremely high priority. This far exceeded the next priority: expanding roads to help reduce congestion (60% high or extremely high).
- Millennials were more likely than the other generations to place a high priority on providing convenient alternatives to driving, expanding public transportation, and developing communities where more people do not have to drive long distances.
- When asked how to replace shrinking gas tax revenues, 28% indicated that they preferred no replacement and 25% did not have an opinion. Equal shares (17%) opted for increasing the gas tax or replacing it with a tax based on miles driven.

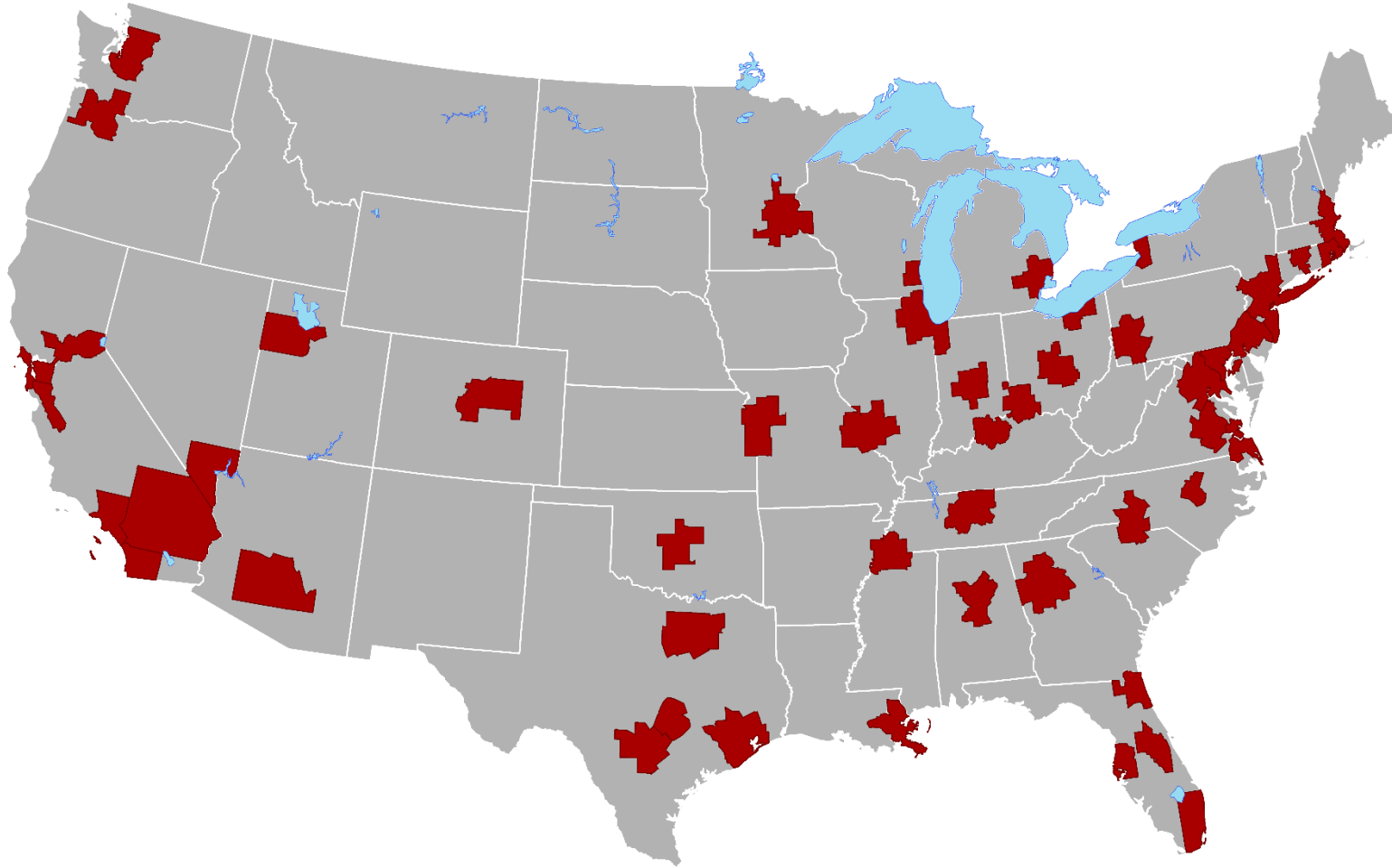
Highlights: Housing & Communities

- When choosing a new home, respondents want transportation choices. 85% said that sidewalks were important, followed by easy access to the highway (82%) and being within an easy walk of places (79%).
- Millennials placed more importance on being within an easy walk of places and having public transit nearby, compared to the other generations.
- When asked to choose between a more conventional suburb and a walkable community, respondents were about evenly split.
- Many people want to live in a more walkable neighborhood than they do now. Overall, 25% currently live in a detached, single-family home, but would prefer to live in an attached home in a neighborhood where they could walk to places & have a shorter commute.
- People who currently live in neighborhoods with lots of places to walk to nearby are more satisfied with the quality of life in their community.

Methodology: Summary

- The sample included adults living in the 50 largest metropolitan statistical areas (MSAs) in the U.S.
- The survey was conducted May 13-19, 2015.
- 1,000 respondents were interviewed by phone by American Strategies (679 by landline and 322 by wireless phone). Margin of error 3.1%
- 2,000 respondents were surveyed on-line by YouGov. Margin of error 2.2%
- Responses were weighted to better match demographics according to the American Community Survey and the two samples were combined.

Methodology: Metro Areas Sampled



Findings: Everyday travel

How often are people walking, bicycling, and taking transit?

What do they think about these travel modes?

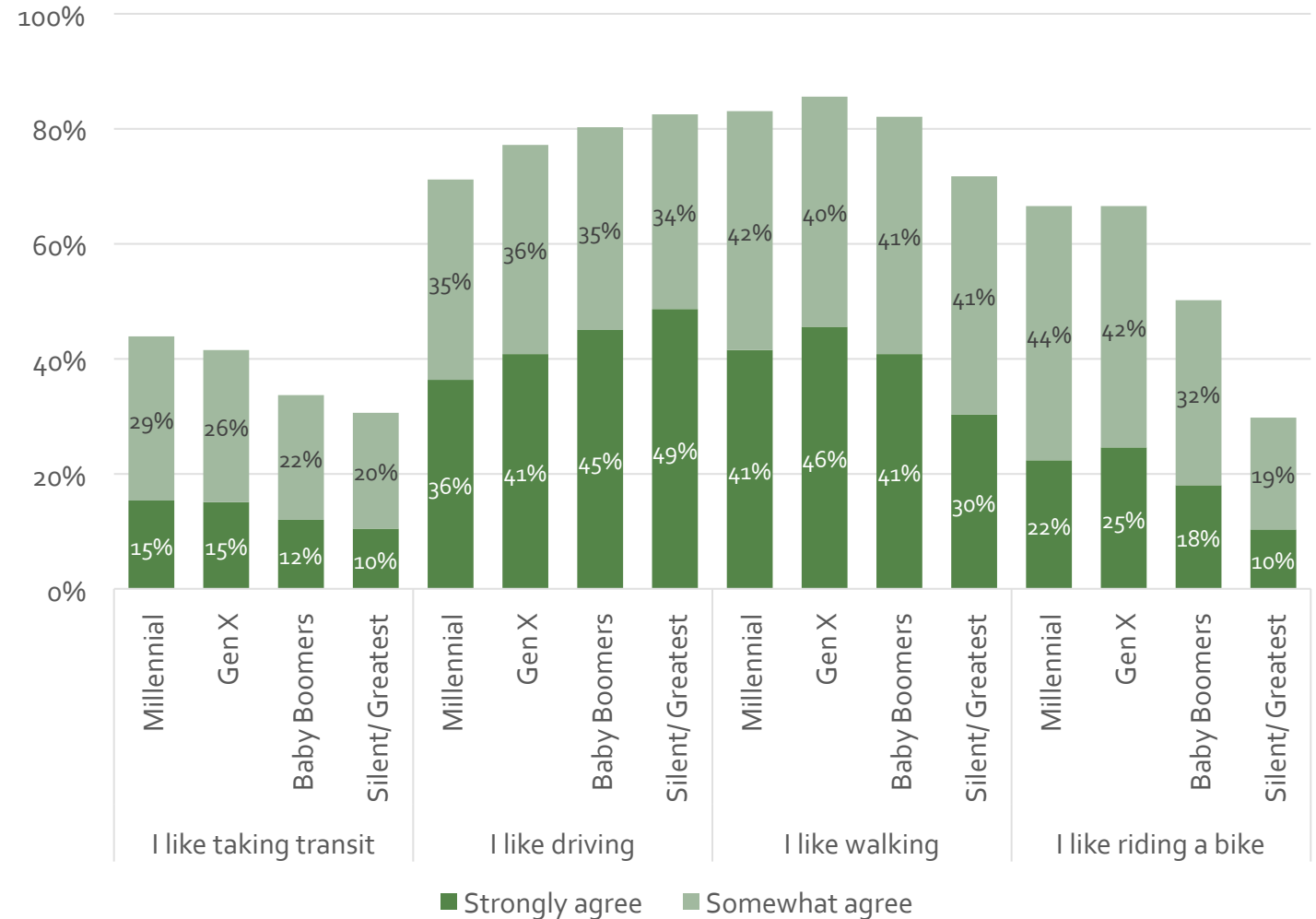
Why do they walk/bike/take transit and why not?

Attitudes towards travel modes

Millennials like taking transit more than any other generation and, while they do like driving, they like it less than any other generation.

Millennials and Gen Xers like bicycling significantly more than the older generations.

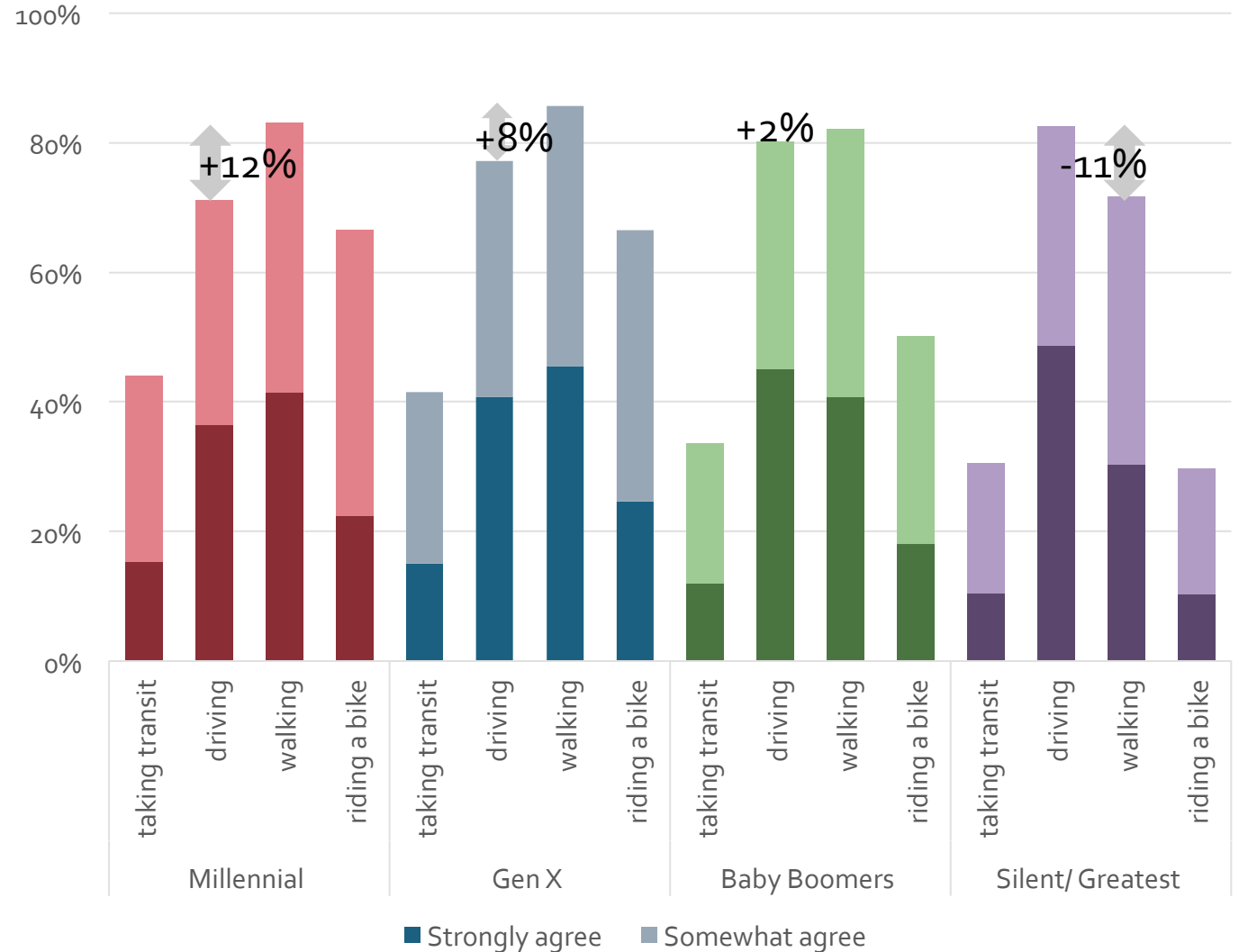
Q27-32. Now, I'd like to ask about your preferences regarding your daily travel. For each statement, please tell me if you strongly disagree, somewhat disagree, somewhat agree, or strongly agree.



While everyone likes walking...

Millennials like it 12 percentage points higher than driving (83% agree that they like walking vs. 71% like driving). This is the largest gap of any generation.

Q27-32. Now, I'd like to ask about your preferences regarding your daily travel. For each statement, please tell me if you strongly disagree, somewhat disagree, somewhat agree, or strongly agree. I like...

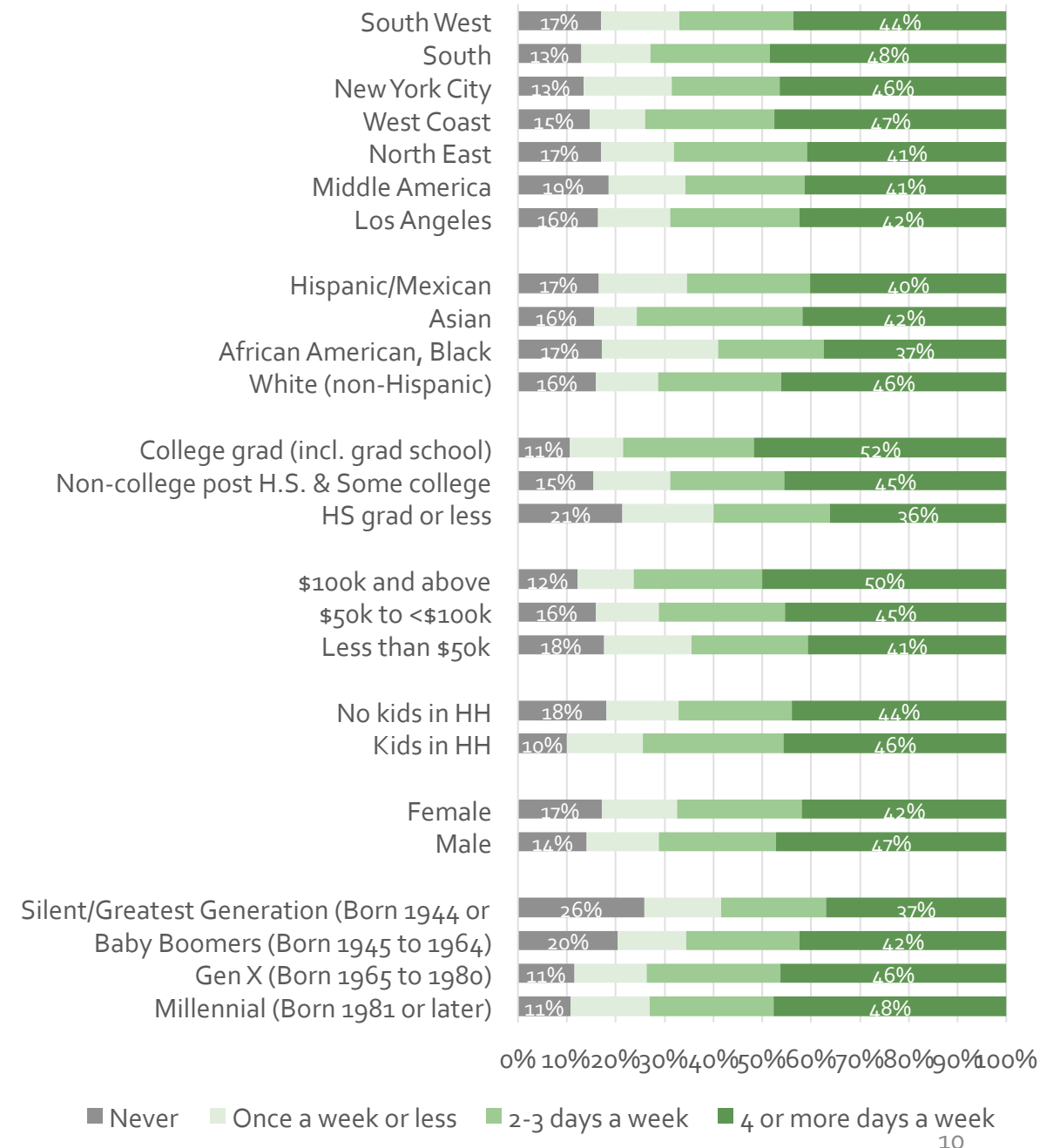


Walking in the past 30 days

Millennials walked an average of 13.3 days in the past 30 days, the highest of any generation.

Walking frequency increases with income and education.

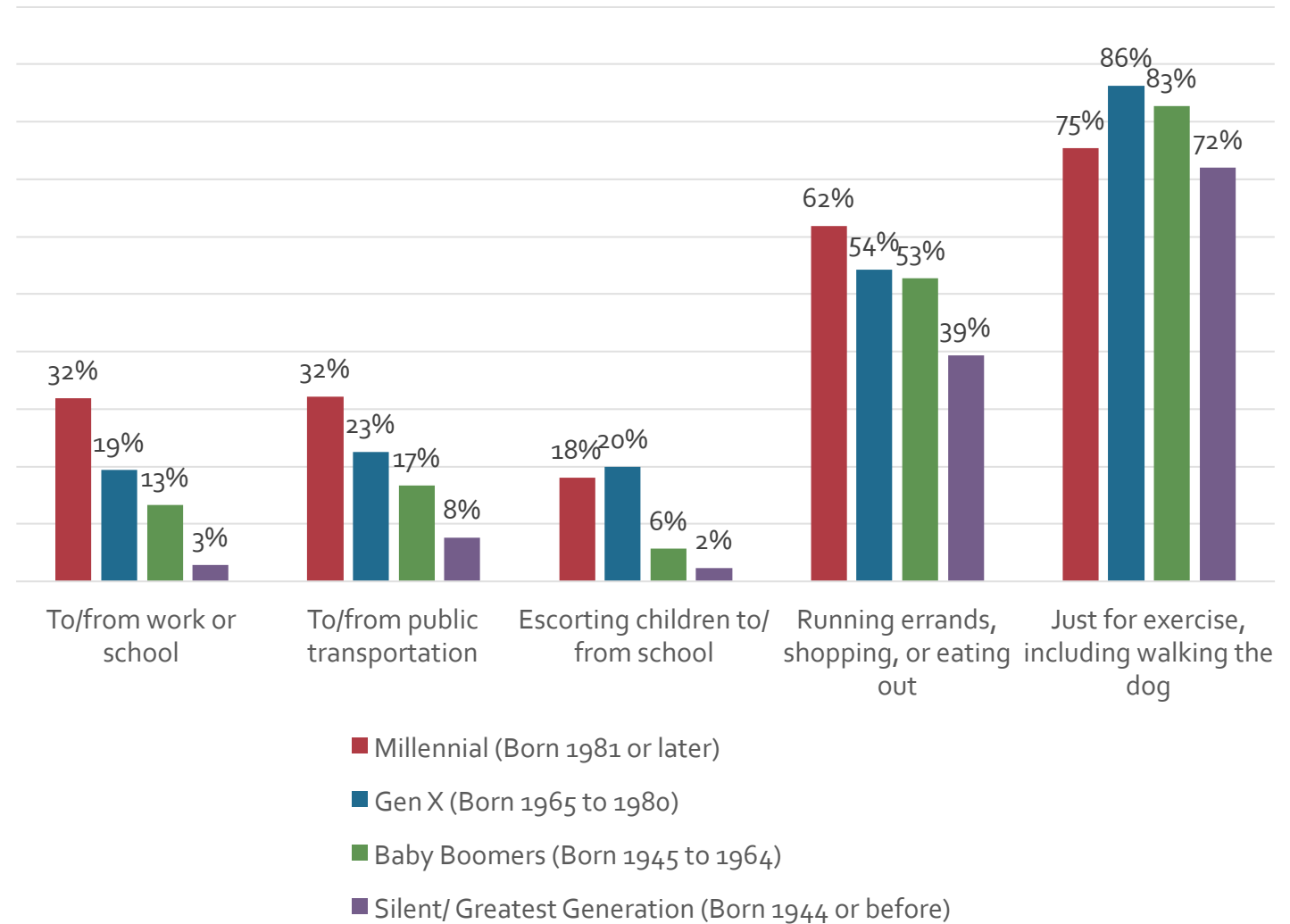
Q51. In the past 30 days, how many days did you take a walk outside for more than 10 minutes including walking the dog and walks for exercise?
0=Never; 1-4=Once a week or less; 5-15=2-3 days a week;
16+ = 4 or more days a week



Millennials are most likely to walk for transportation

Over 30% of Millennials reported walking to or from work/school in the past 30 days, compared to less than 20% of Gen Xers or Baby Boomers. Over 60% of Millennials reported walking for errands, shopping or eating out.

Gen Xers and Baby Boomers were more likely than Millennials to walk for exercise.

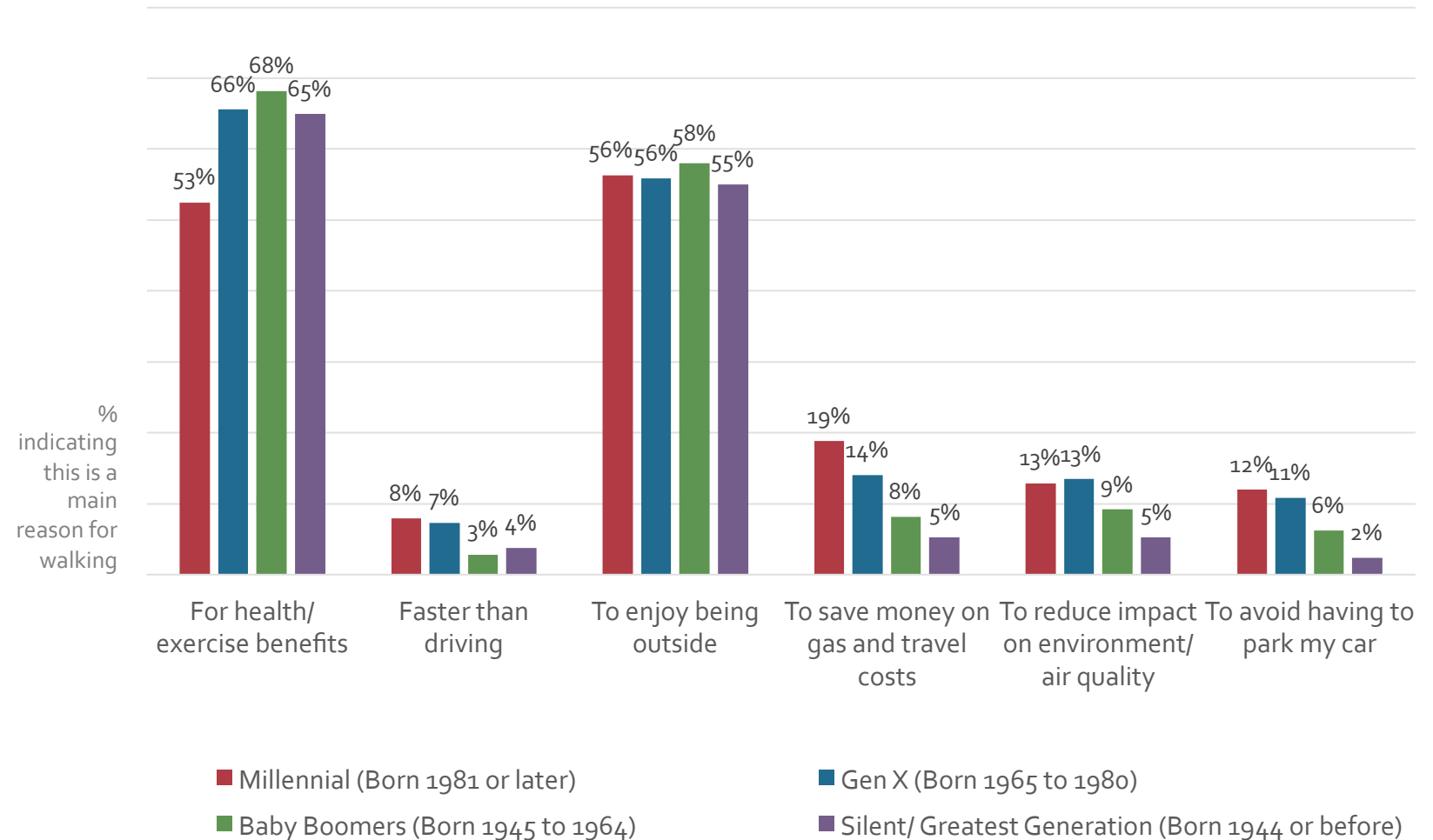


Q52-56. Were any of these walks you took...

Health and being outside are the main reasons for walking

However, some motivations vary by age. While a majority of all adults indicate that health and exercise benefits are a main motivation for walking, Millennials were less likely to give this reason.

19% of Millennials indicated that saving money was a main reason for walking.



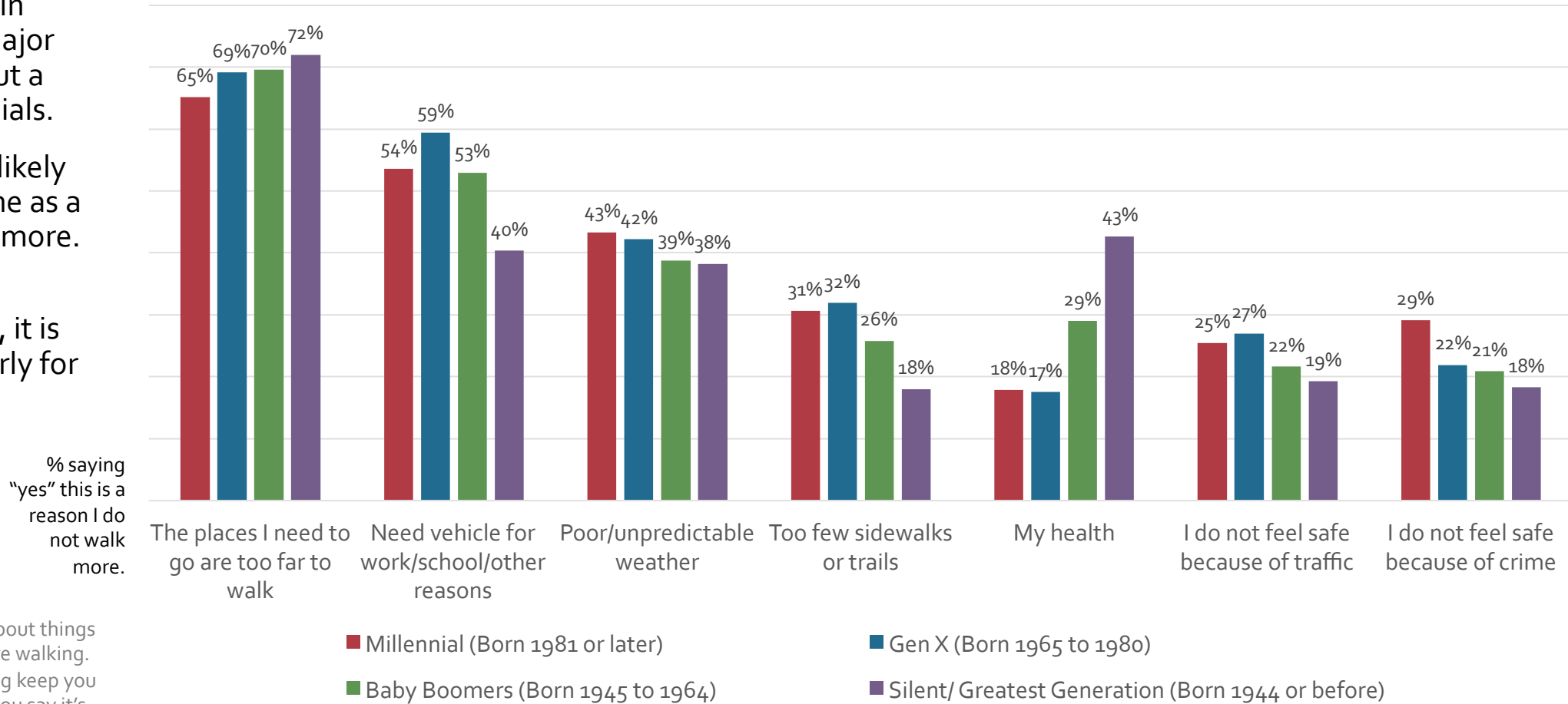
Q57-62. Why do you choose to walk? Is this a main reason, somewhat of a reason, or not a reason at all?

Reasons for not walking more: Neighborhood design is important

Not having places within walking distance is a major barrier for everyone, but a little less so for Millennials.

Millennials were more likely to cite safety from crime as a reason for not walking more.

While health is a major motivation for walking, it is also a barrier, particularly for the oldest generation.

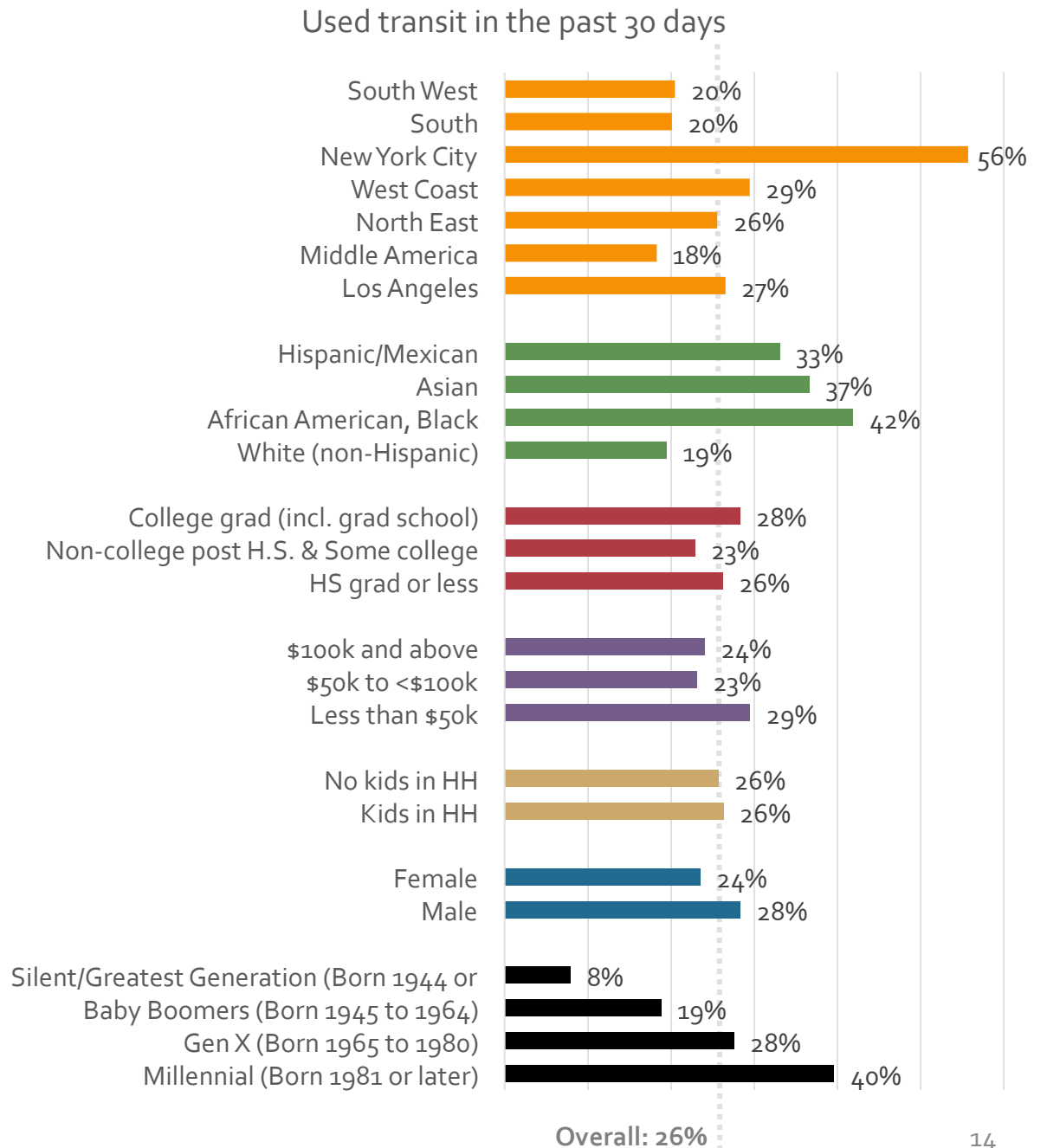


Q63-69. Now I'd like you to think about things that may keep you from doing more walking. Please tell me if any of the following keep you from doing more walking? Would you say it's because...

Transit use in the past 30 days

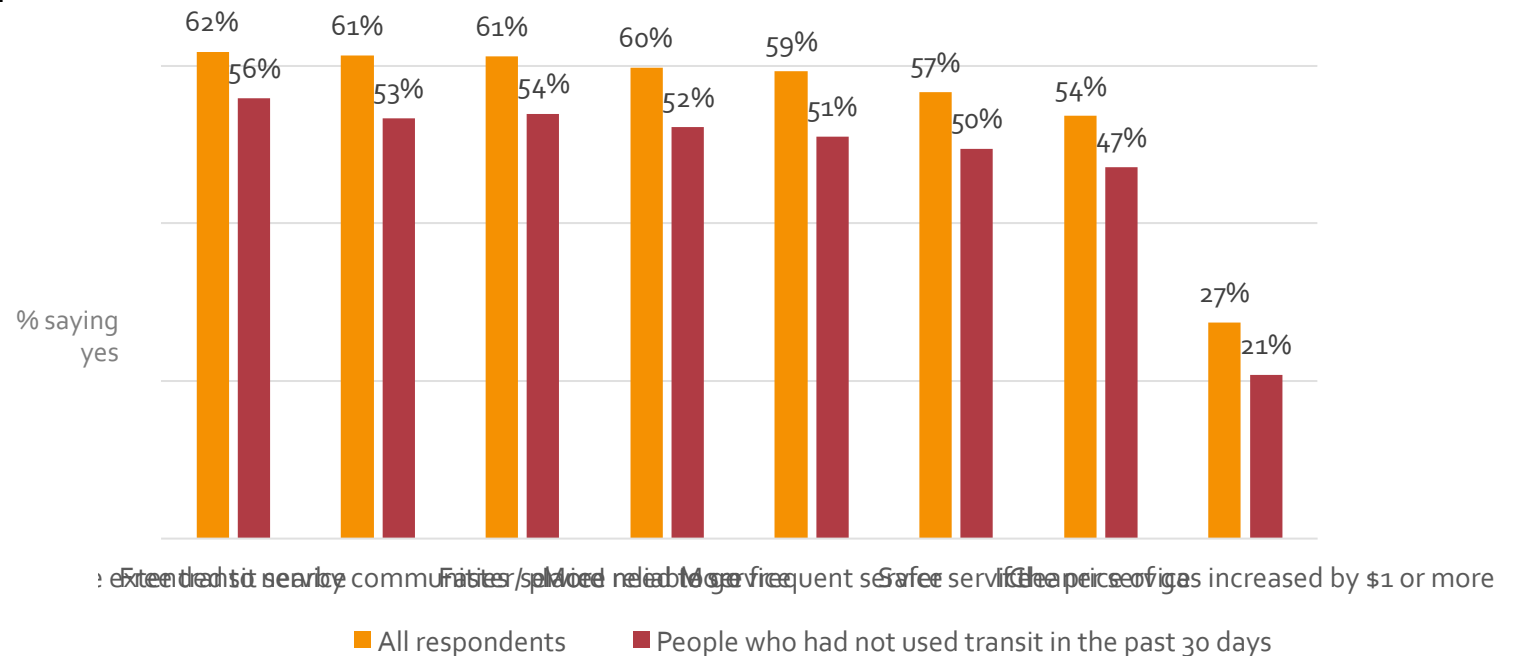
Millennials are more likely to have taken transit in the past month than nearly any other demographic category.

Q35. In the past 30 days, about how many days did you use public transportation such as buses, subways, light rail, or commuter trains?



Gas price increases won't motivate more transit use

Respondents say that lower or free fares and better transit service would encourage them to ride more, but a \$1 increase in gas prices likely would not.



Q37 Please tell me, yes OR no, if any of the following would encourage you to make greater use of transit service.

Only asked of people who said they had transit available.

Most transit riders have other options

Only 22% of Millennials and Baby Boomers, 29% of Gen Xers, and 4% of the Silent Generation who had taken transit in the past 30 days strongly agreed that it is their only option.

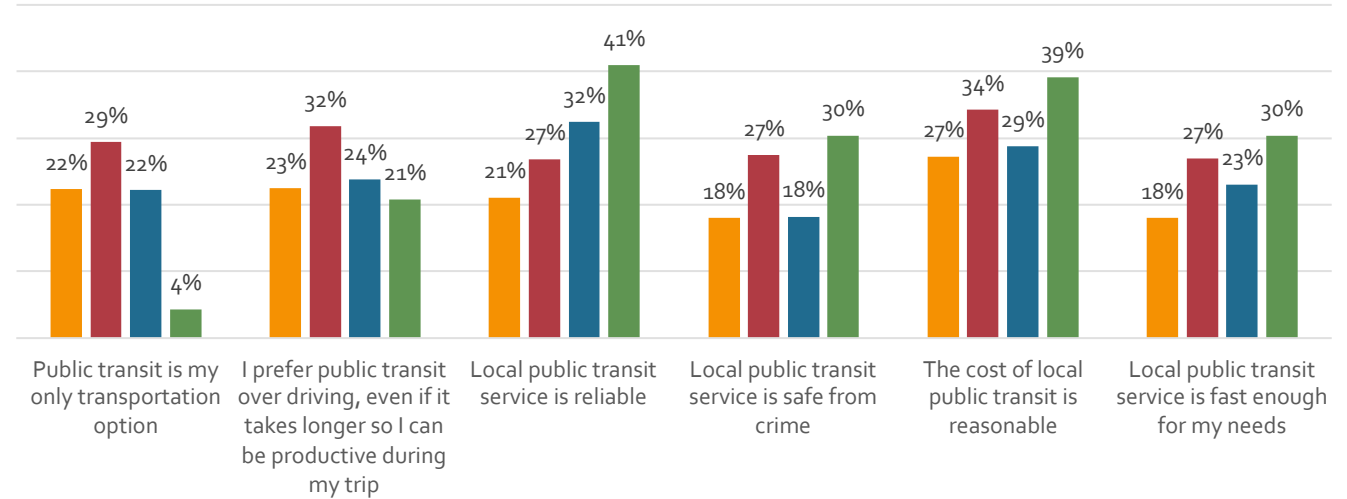
Of those who used transit, Millennials were the least likely to strongly agree that service is reliable. This is likely a result of their more frequent use.

Gen Xers who used transit were the most likely to strongly agree that they preferred transit to driving because they would be productive.

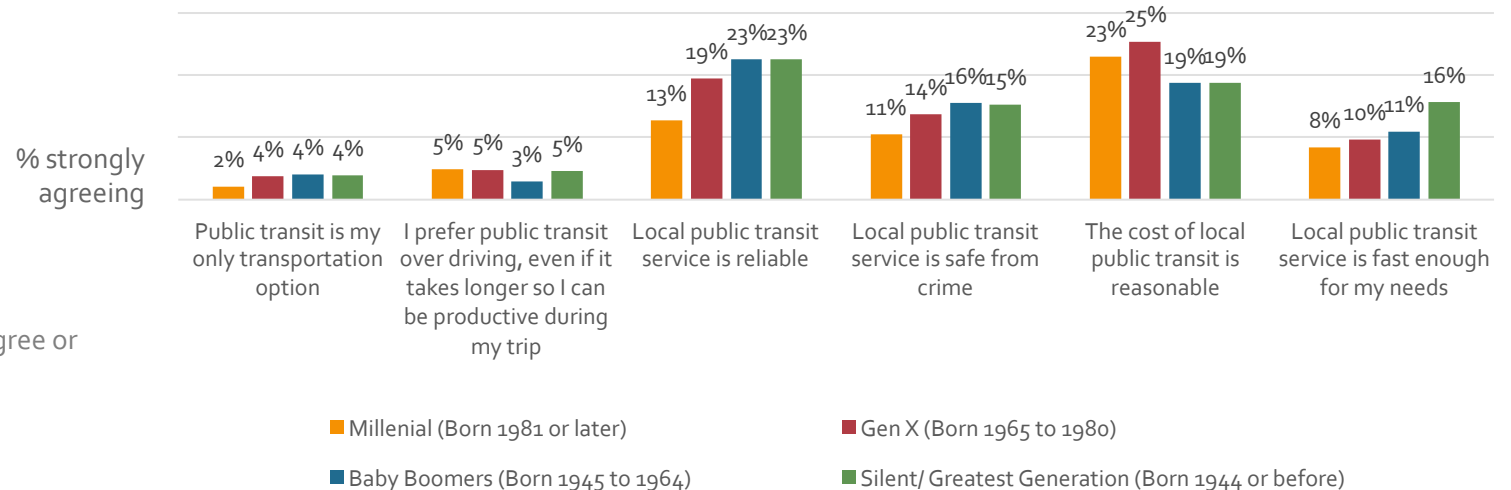
Q45 For each of the following statements, please tell me if you agree or disagree.

Only asked of people who said they had transit available.

People who had used transit in the last 30 days



People who had NOT used transit in the last 30 days



Biking in the past 30 days

72% stated they were physically able to ride a bicycle and knew how. Of those, 24% rode a bicycle in the past 30 days. Most of those people only rode for exercise, and not to go to work, errands, or other transportation purposes.

Gen Xers were the most likely generation to ride, though Millennials were the most likely to have ridden for transportation.

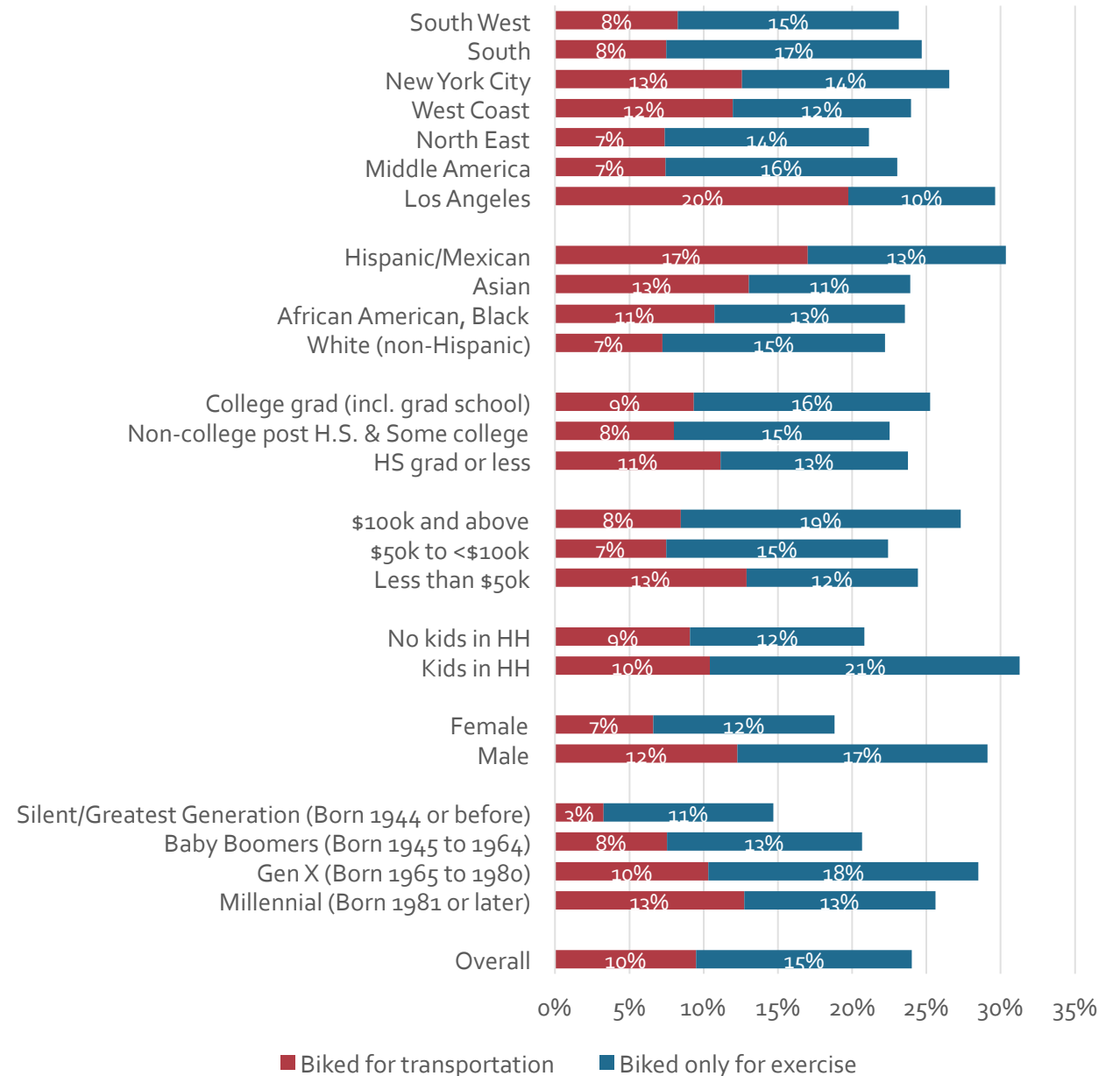
People with kids were more likely to ride only for exercise.

Q72. In the past 30 days, about how many days did you ride a bicycle outside including bicycling for exercise?

(Asked if able to ride bicycle and know how in bike or if physical limitation was a temporary condition)

Note: People who biked for transportation (red in the graph) may also have biked for exercise.

Biked in the past 30 days (of those physically able to)



What keeps people from biking more

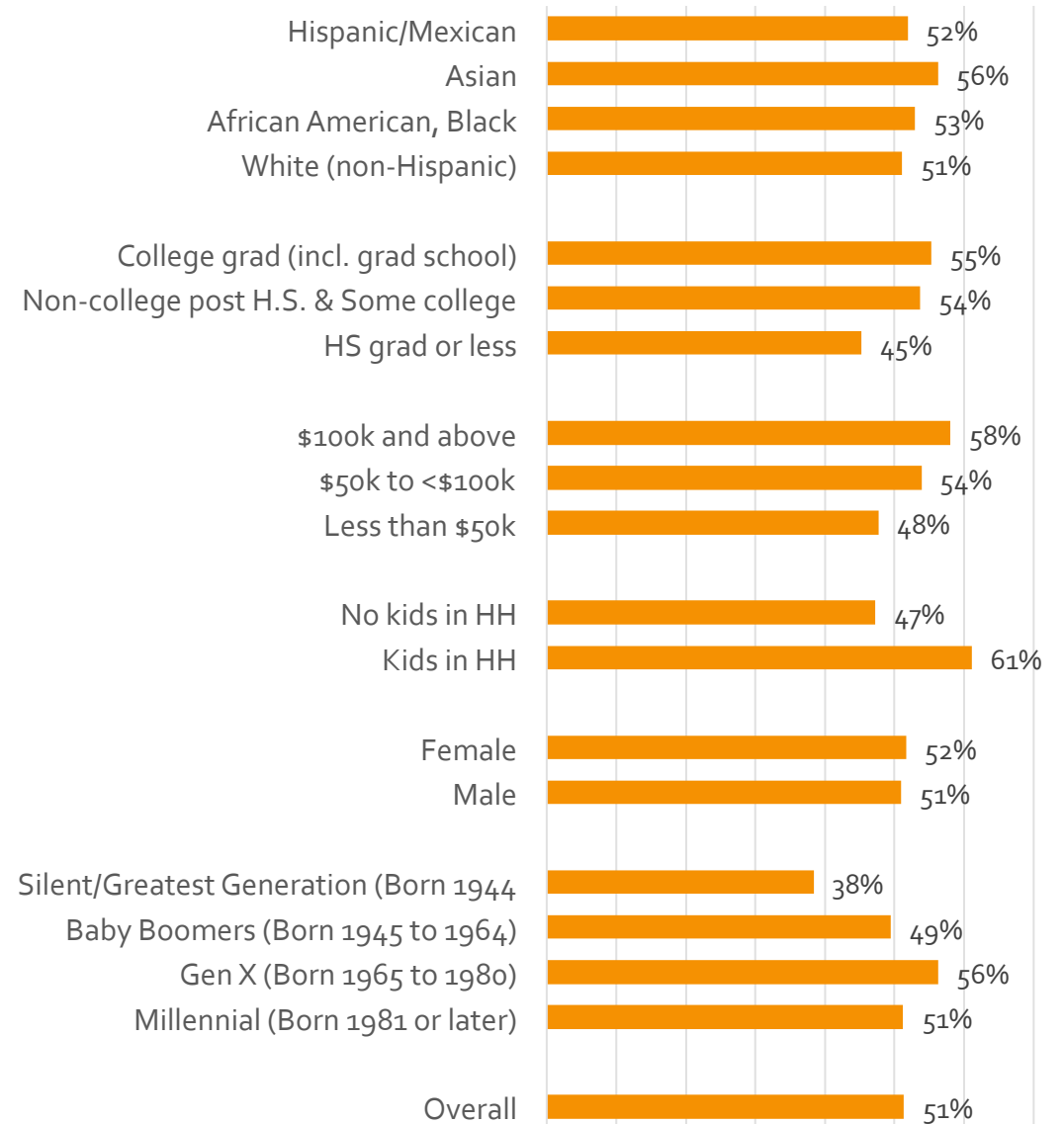
	Overall %
Need vehicle for work/school/other reasons	51%
The places I need to go are too far to bike	49%
I do not have a bike to ride	47%
I do not feel safe because of traffic	41%
Too few bike lanes or trails	38%
Poor/unpredictable weather	36%
I do not feel safe because of crime	18%
My health	12%

Reason for not biking: Needing a vehicle for other reasons

People with kids are most likely to cite this as a barrier to bicycling more

Q86 (If able to ride bicycle and know how in bike or temporary condition)
Now, I'd like you to think about things that may keep you from doing more biking. Please tell me yes OR no, if any of these keep you from doing more biking?

Need vehicle for work/school/other reasons

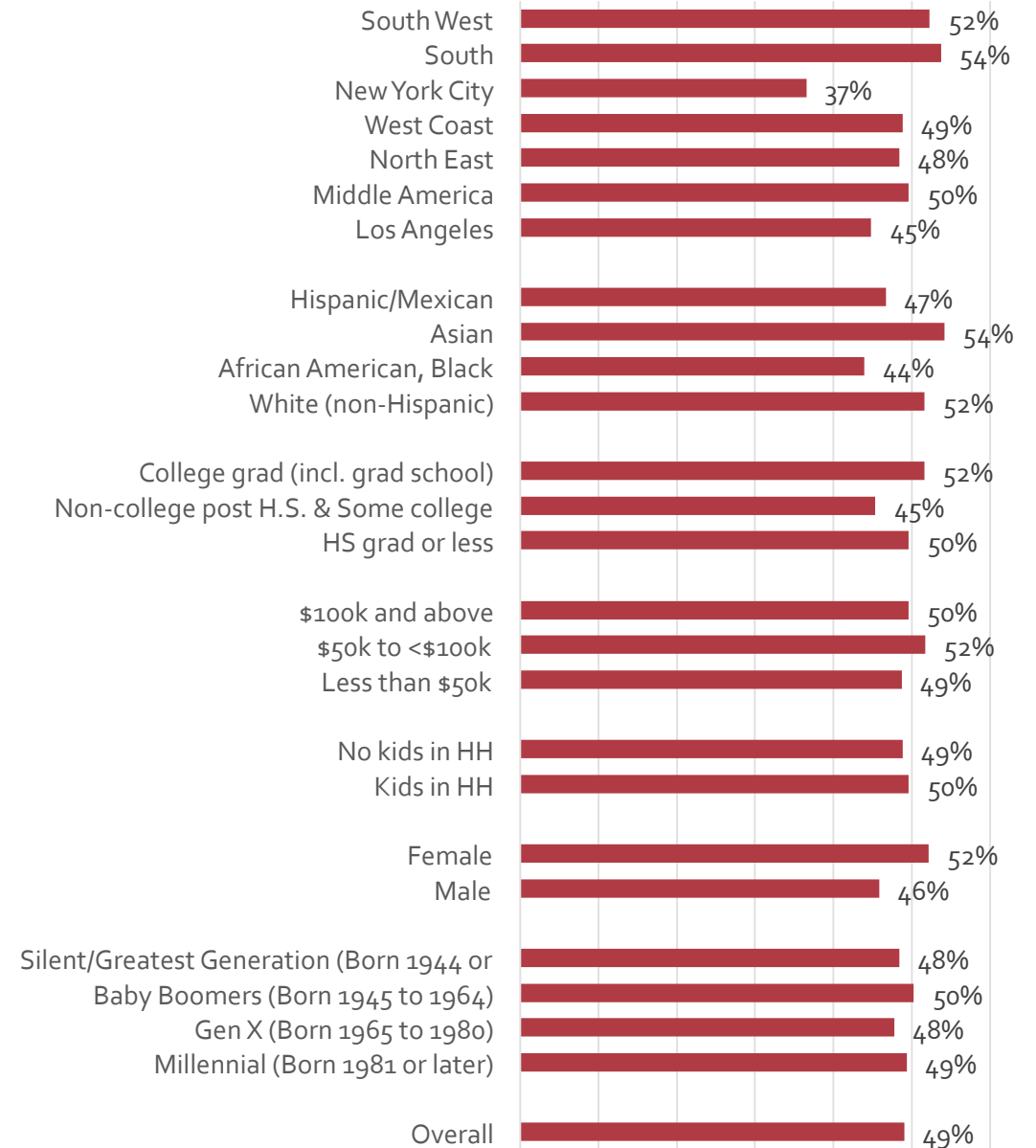


Reason for not biking: Places are too far away

About half of the adults say that the places they need to get to are too far away to bicycle. This is generally true for all the demographic groups, pointing to people's complex travel needs and current land use patterns that separate many destinations.

Q84 (If able to ride bicycle and know how in bike or temporary condition)
Now, I'd like you to think about things that may keep you from doing more biking. Please tell me yes OR no, if any of these keep you from doing more biking?

The places I need to go are too far to bike



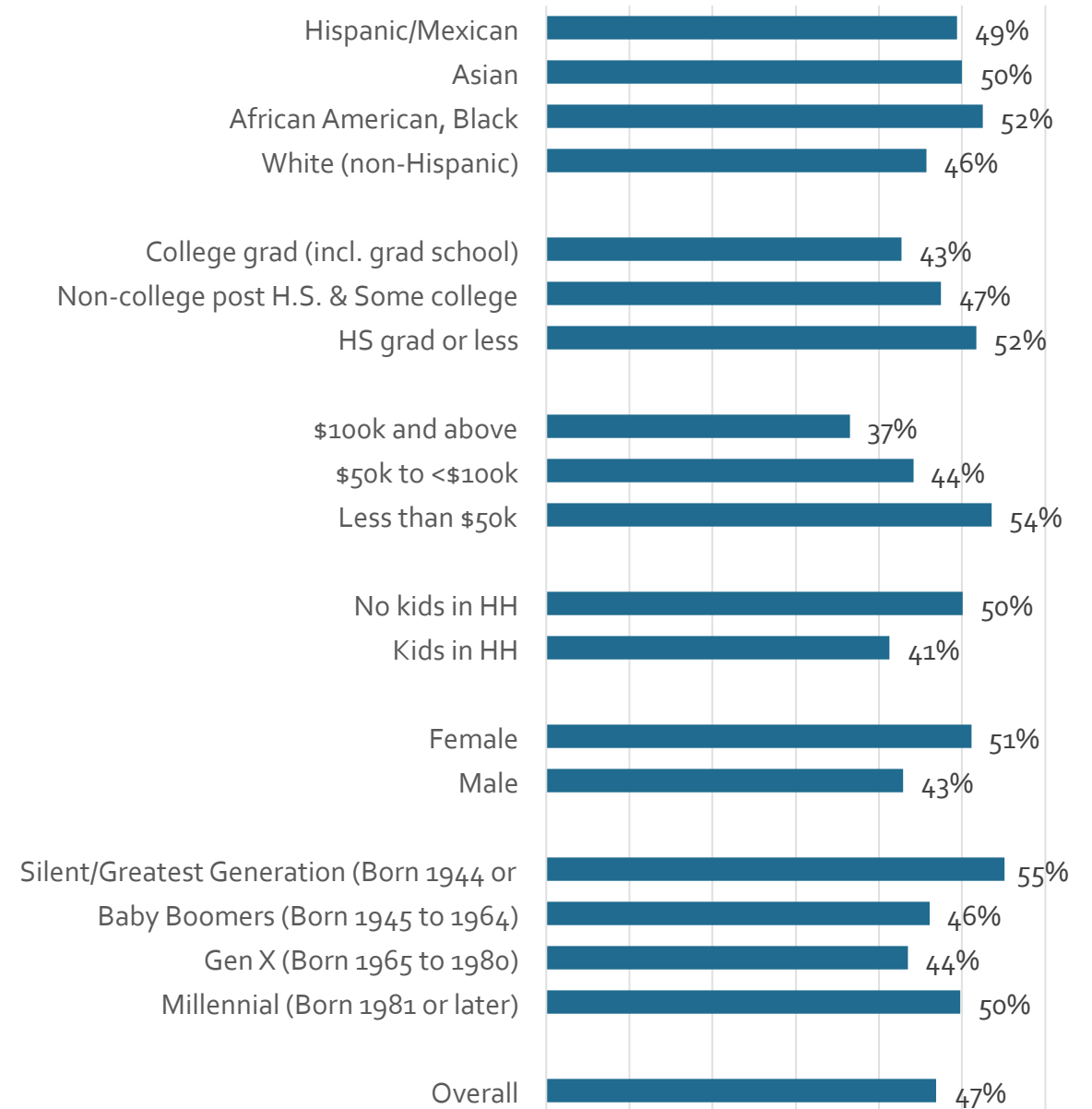
Reason for not biking: Don't have a bike

Just under half (47%) of the adults who are physically able to ride a bicycle cite not having a bike as a reason for not riding.

This is a barrier particularly for people with lower incomes and for women.

Q91 (If able to ride bicycle and know how in bike or temporary condition)
Now, I'd like you to think about things that may keep you from doing more biking. Please tell me yes OR no, if any of these keep you from doing more biking?

I do not have a bike to ride

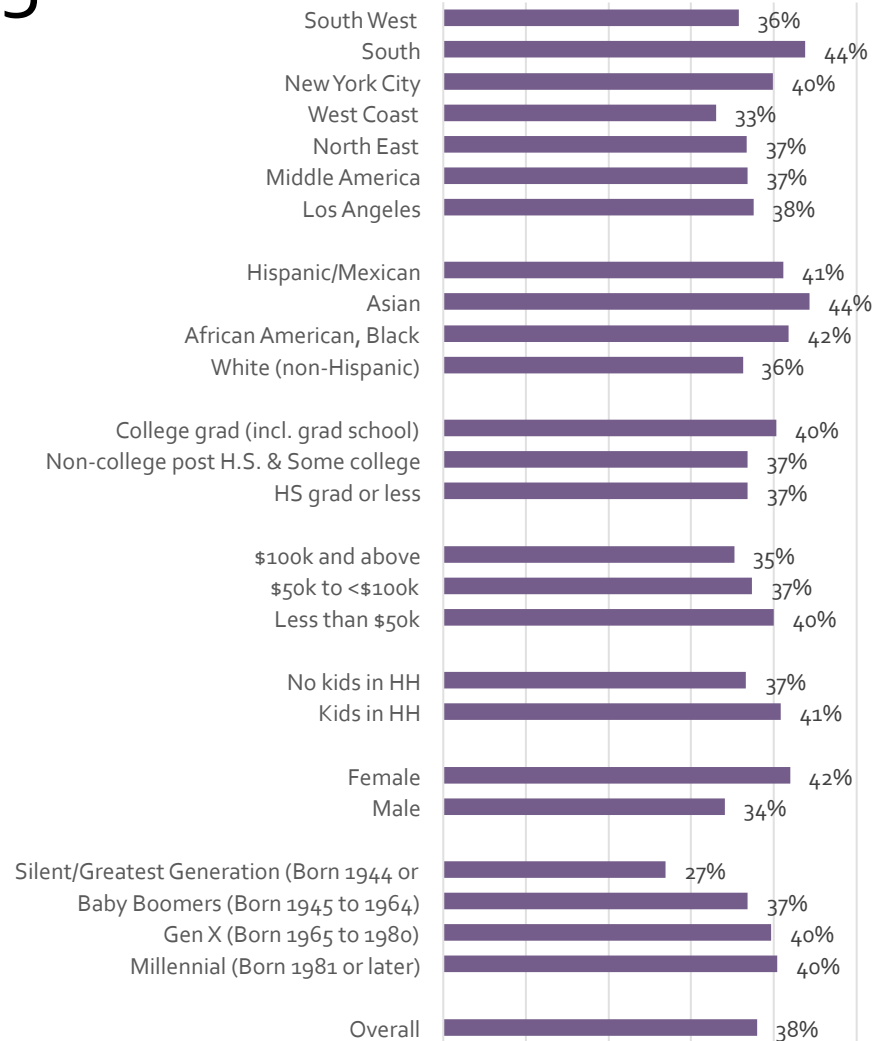


Reason for not biking: Traffic and lack of bike lanes

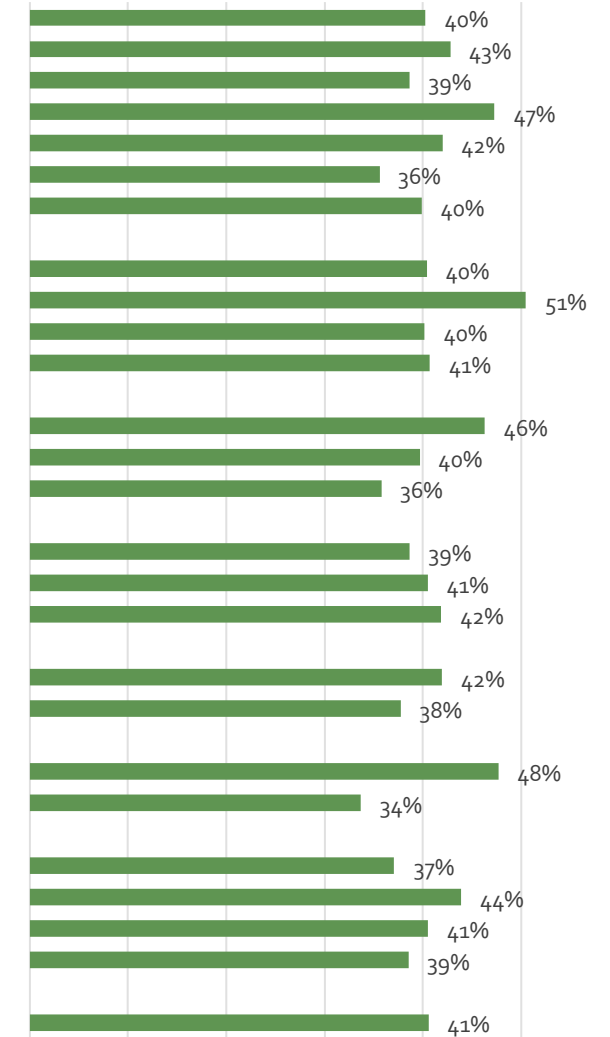
Not feeling safe because of traffic was generally a bigger reason for not biking than the lack of bike lanes or trails. The responses were not always consistent for these two barriers within demographic groups, indicating that for some people bike lanes/trails may not address their concerns about traffic.

Q85, 89 (If able to ride bicycle and know how in bike or temporary condition) Now, I'd like you to think about things that may keep you from doing more biking. Please tell me yes OR no, if any of these keep you from doing more biking?

Too few bike lanes or trails



I do not feel safe because of traffic



Comfort level biking in different environments

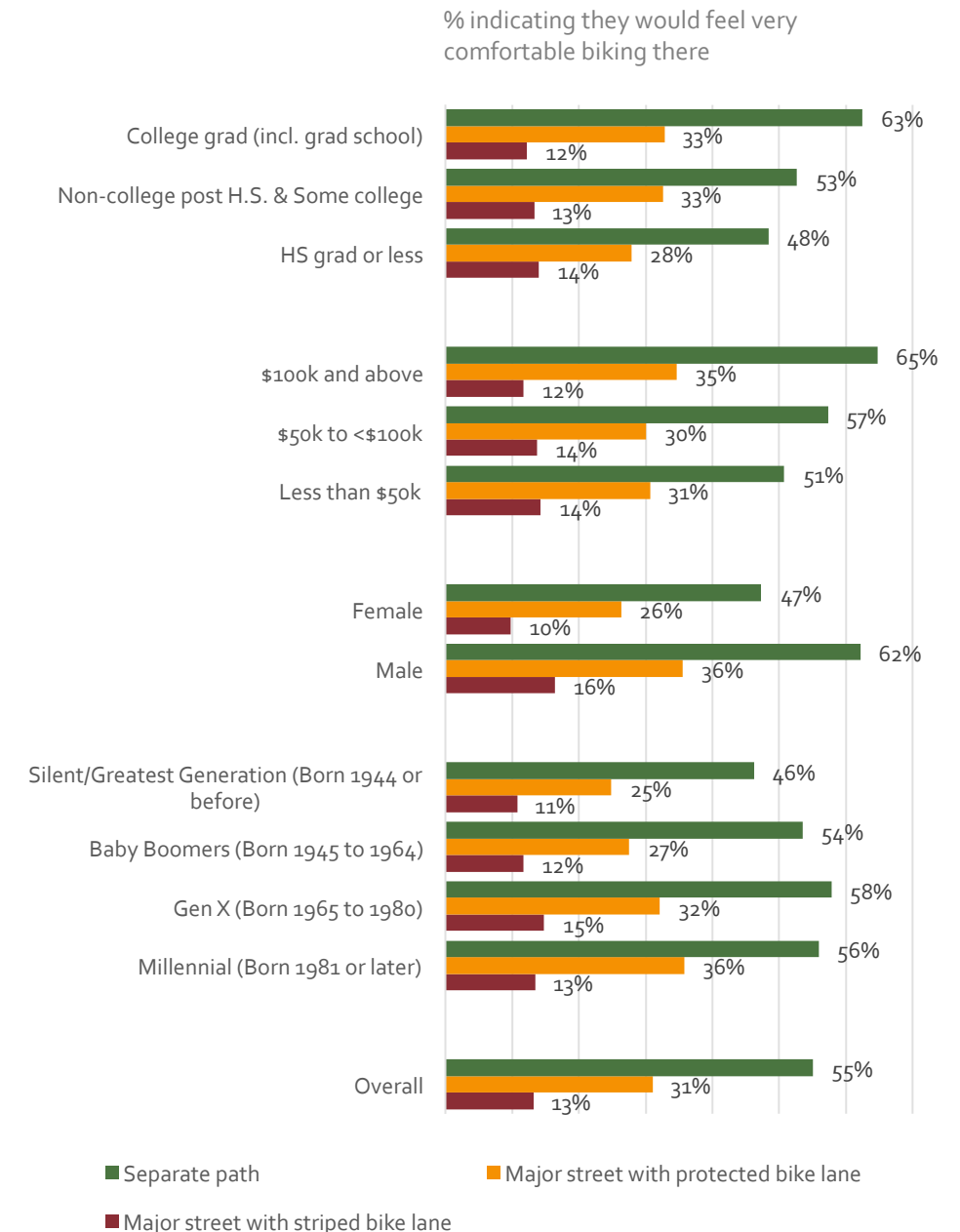
Most people feel very comfortable riding a bike on a separate path or trail. But only 13% feel very comfortable riding on a busy urban street with only a striped bike lane – the most common type of bike infrastructure in most cities. Adding more protection from traffic, such as with a curb, planters, or parked cars, increased comfort. 31% said they would feel very comfortable riding in such a lane.

Women and older adults feel least comfortable.

Q84. Only includes people who can physically ride a bicycle and know how.

Now, I'm going to read you a list of places you could ride a bike. For each, please tell me whether you would be comfortable or uncomfortable biking there.

- path or trail separate from the street
- major urban or suburban street with four lanes, on-street parking, traffic speeds of 30-35 miles per hour, and a striped bike lane
- major urban or suburban street with four lanes, on-street parking, traffic speeds of 30-35 miles per hour, and wide bike lane physically separated from traffic by a raised curb, planters, or parked cars



Findings: Transportation Policy Priorities

What are respondents' transportation priorities for the government?

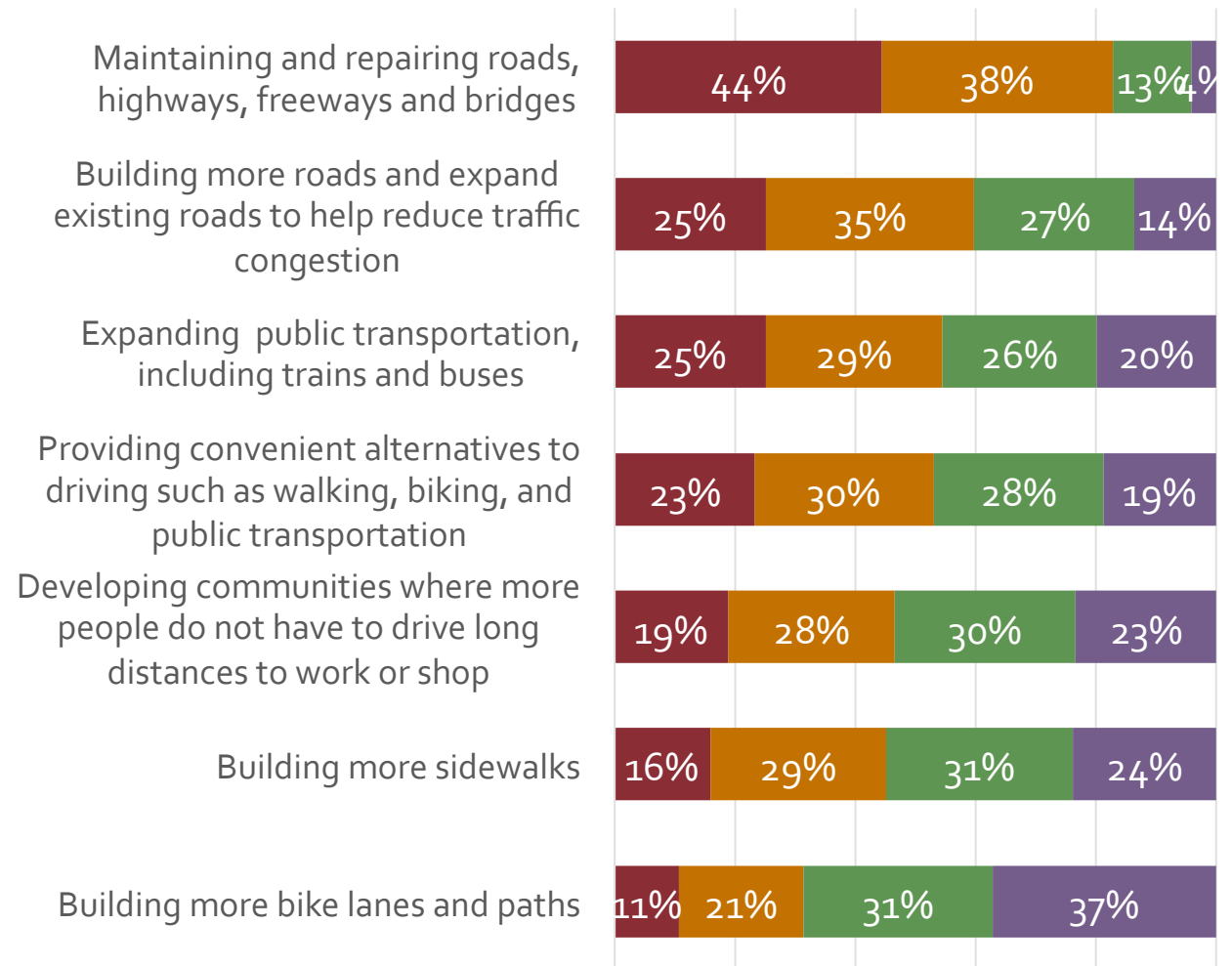
Maintenance is the clear priority

83% indicated that maintaining and repairing roads and bridges is a high priority, with over half of those saying it is an extremely high priority

This far exceeded the next priority: expanding roads to help reduce congestion (60% high or extremely high)

Over half indicated that expanding public transit and providing convenient alternatives to driving, such as walking, biking and transit were high priorities.

Q19-25 . Now, I'm going to read you a list, and I'd like you to tell me whether each of the following should be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for the government.



■ Extremely High ■ High priority
■ Middle priority ■ Low priority

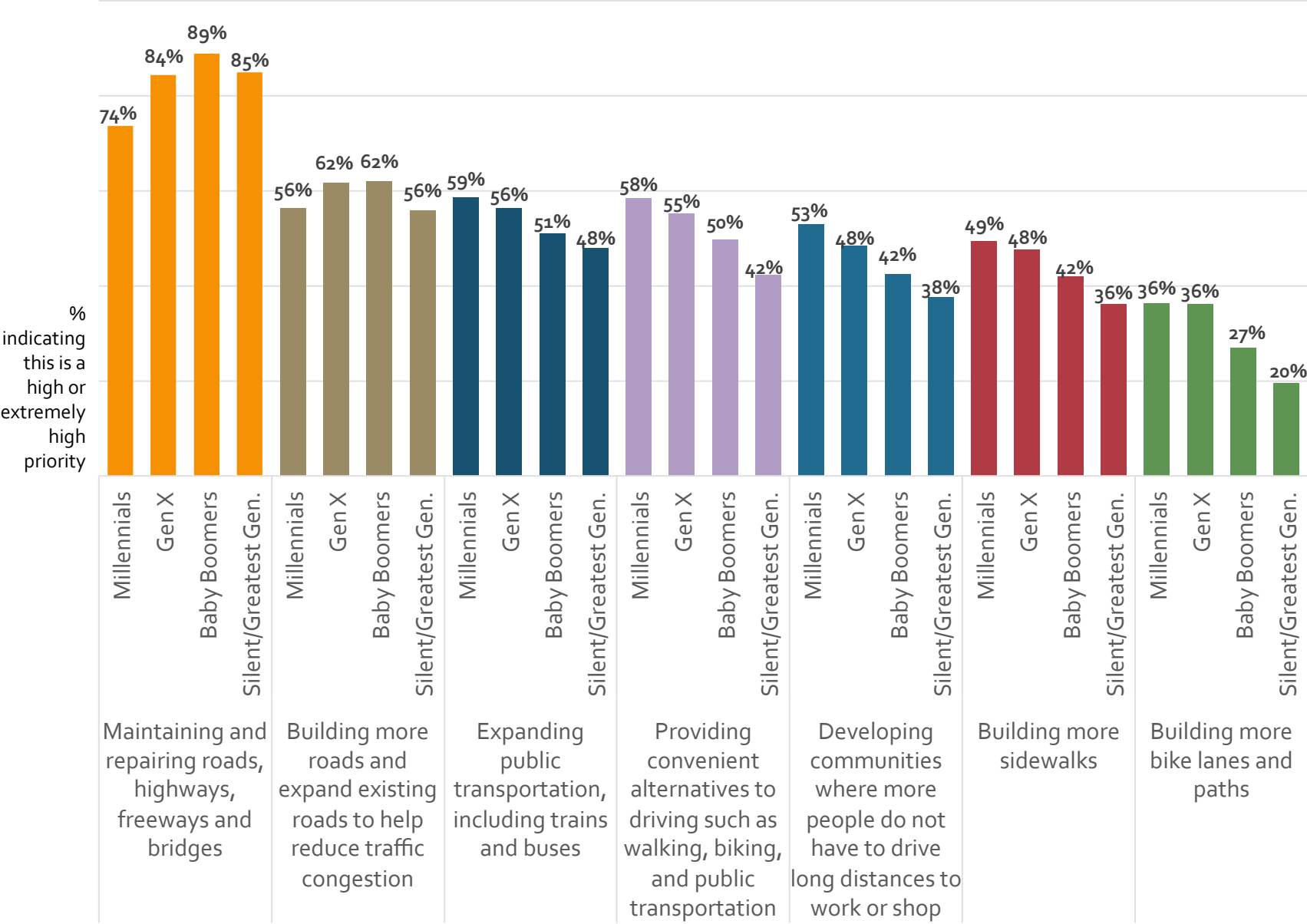
Don't know responses not included (<5%).

Priorities vary some by generation

Maintenance is the highest priority for all generations, though it is less so for millennials compared to the older generations

Millennials generally place higher priority on transit, walking, and bicycling as government priorities compared to the other generations

Q19-25 . Now, I'm going to read you a list, and I'd like you to tell me whether each of the following should be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for the government.



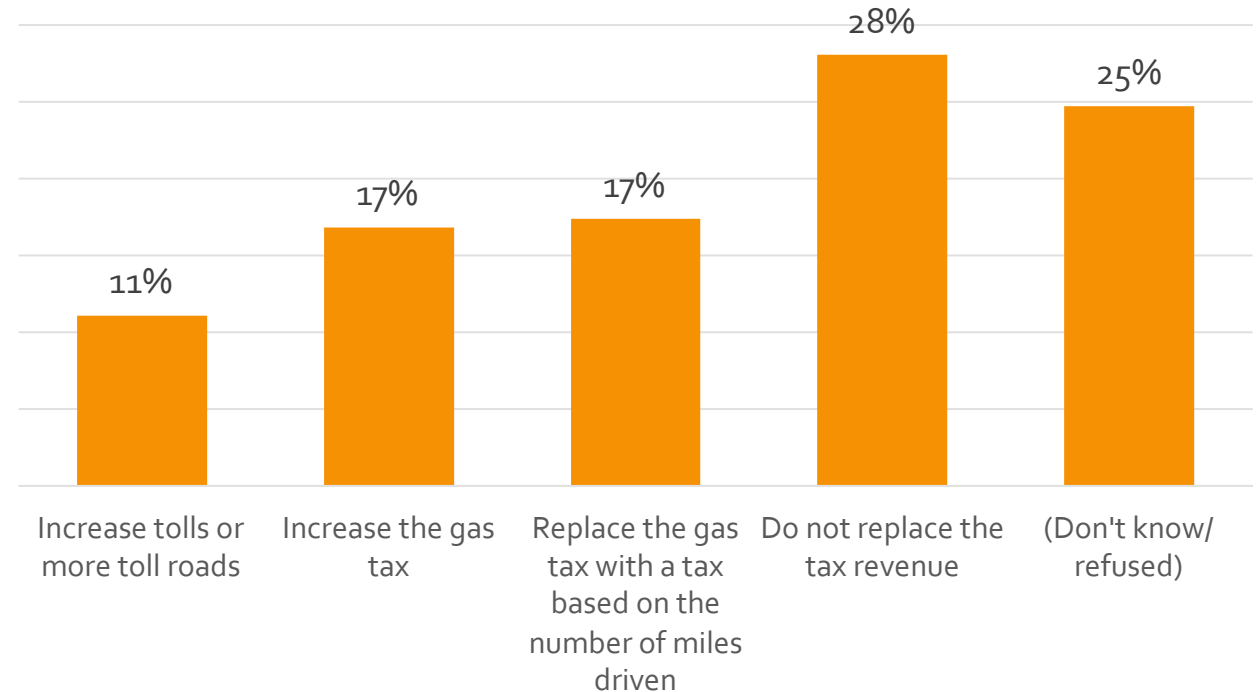
Most don't know how to replace shrinking gas tax revenue or don't want to

When asked how to replace shrinking gas tax revenues, 28% indicated that they preferred no replacement and 25% did not have an opinion.

Equal shares (17%) opted for increasing the gas tax or replacing it with a tax based on miles driven.

A similar question on the 2013 NAR Smart Growth Poll representing both urban and rural Americans had only 8% favoring increasing the gas tax, compared to 20% opting for the tax on miles driven. Equal shares (29%) chose no replacement or were undecided.

Q26 As you may know, increased fuel efficiency in cars has resulted in less gas tax funding to support roads and transit. Thinking about this, which ONE of the following approaches would you take to replace that tax revenue?



Findings: Housing Preferences

What transportation features are important in deciding where to live?

Do people prefer more walkable neighborhoods?

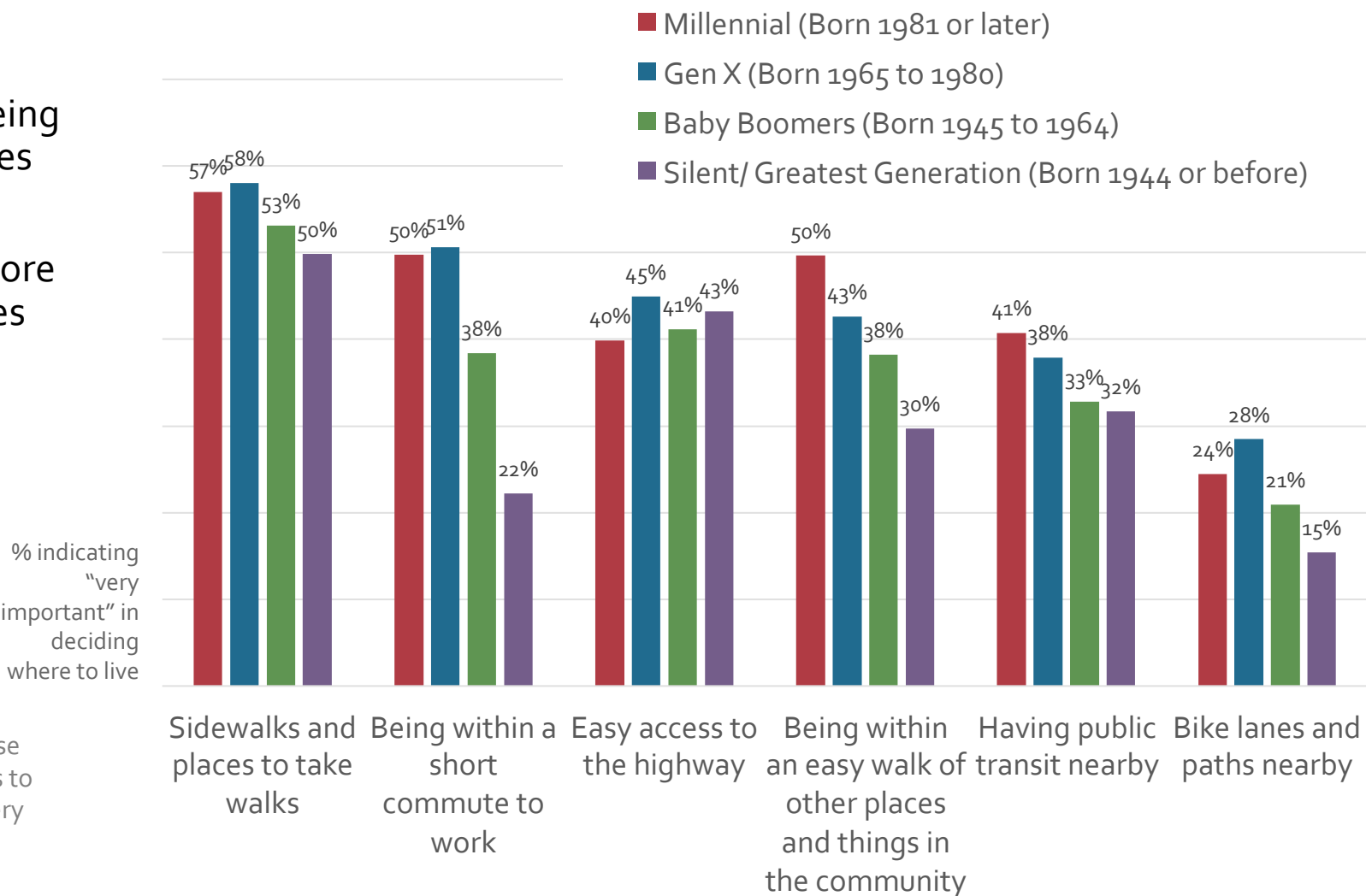
People want transportation options

Important things when deciding where to live...	Important (very or somewhat)	Very Important
Sidewalks and places to take walks	85%	55%
Easy access to the highway	82%	42%
Being within an easy walk of other places and things in the community	79%	42%
Being within a short commute to work	76%	44%
Having public transit nearby	64%	37%
Bike lanes and paths nearby	57%	24%

Some preferences vary by generation

Millennials are more interested in being within easy walking distance of places and having public transit nearby.

Both Millennials and Gen Xers are more interested in sidewalks and bike lanes and paths



Q10-16. If you were deciding today where to live, please indicate how important having each of the following is to you - is it very important, somewhat important, not very important, or not at all important.

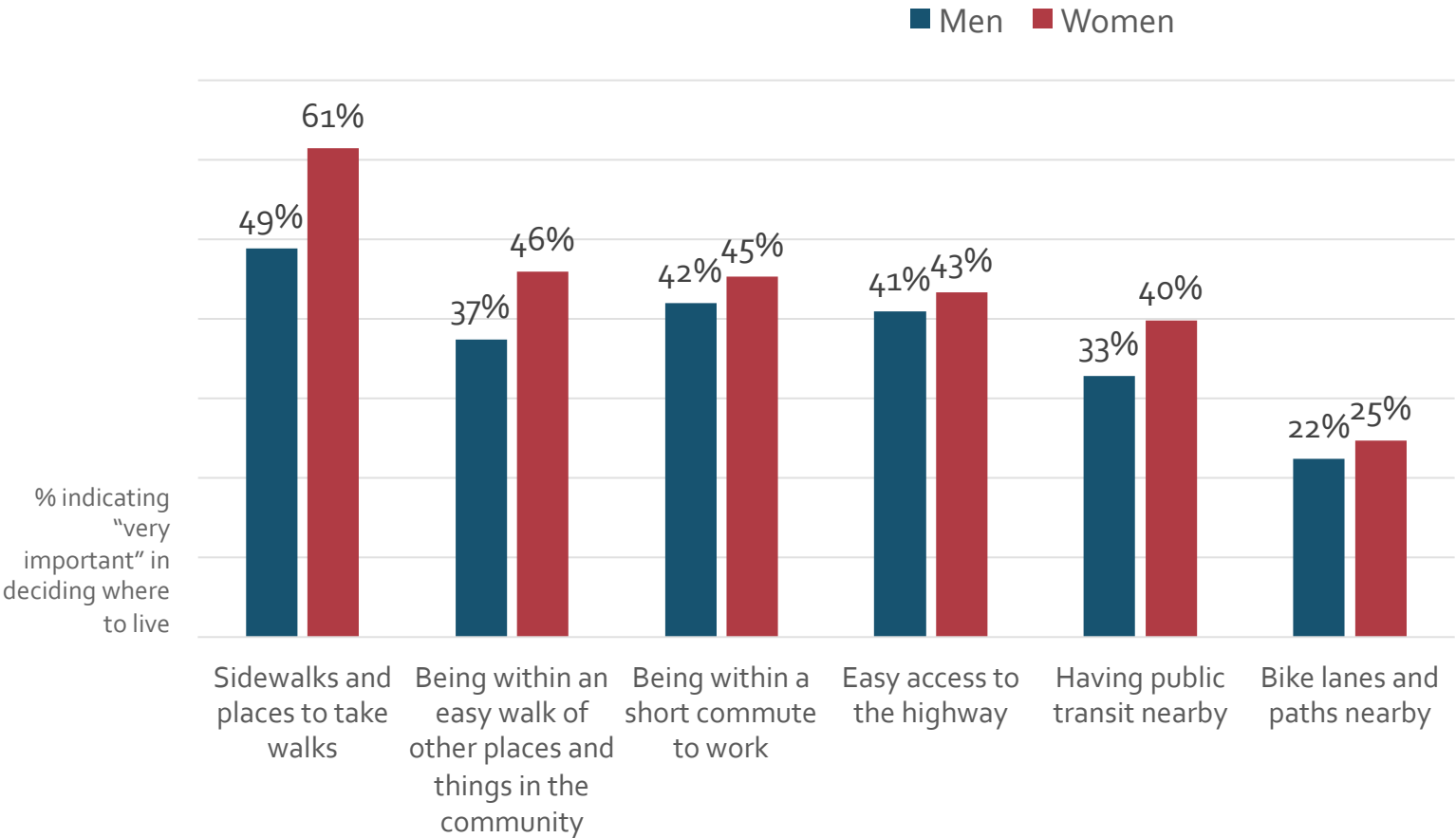
Women value walkability more than men do

A large majority (61%) of women indicated it was very important to have sidewalks and places to take walks when deciding where to live.

46% of women said it was very important to be within easy walking distance of places in the community.

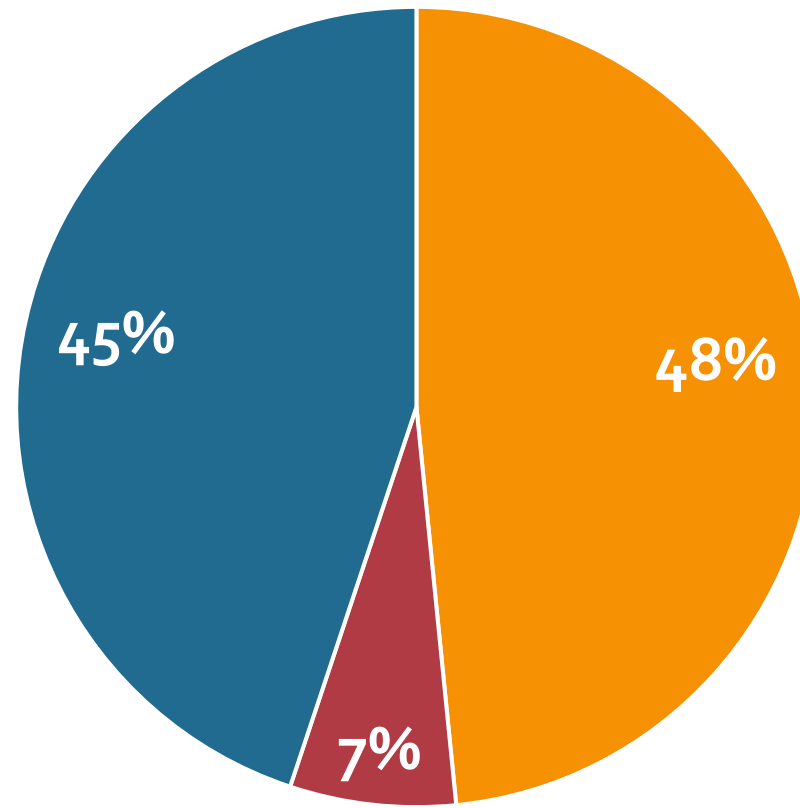
Having public transit nearby was also more important to women.

Q10-16. If you were deciding today where to live, please indicate how important having each of the following is to you - is it very important, somewhat important, not very important, or not at all important.



Americans Split on Preference Between Walkable, Mixed-Use Community and Conventional Suburban Community

Preferred Community



Community A:
(conventional suburb)
Houses with large yards
and you have to drive to
the places you need to
go.

Community B:
(walkable community)
Houses with small yards
and it is easy to walk to
the places you need to
go.

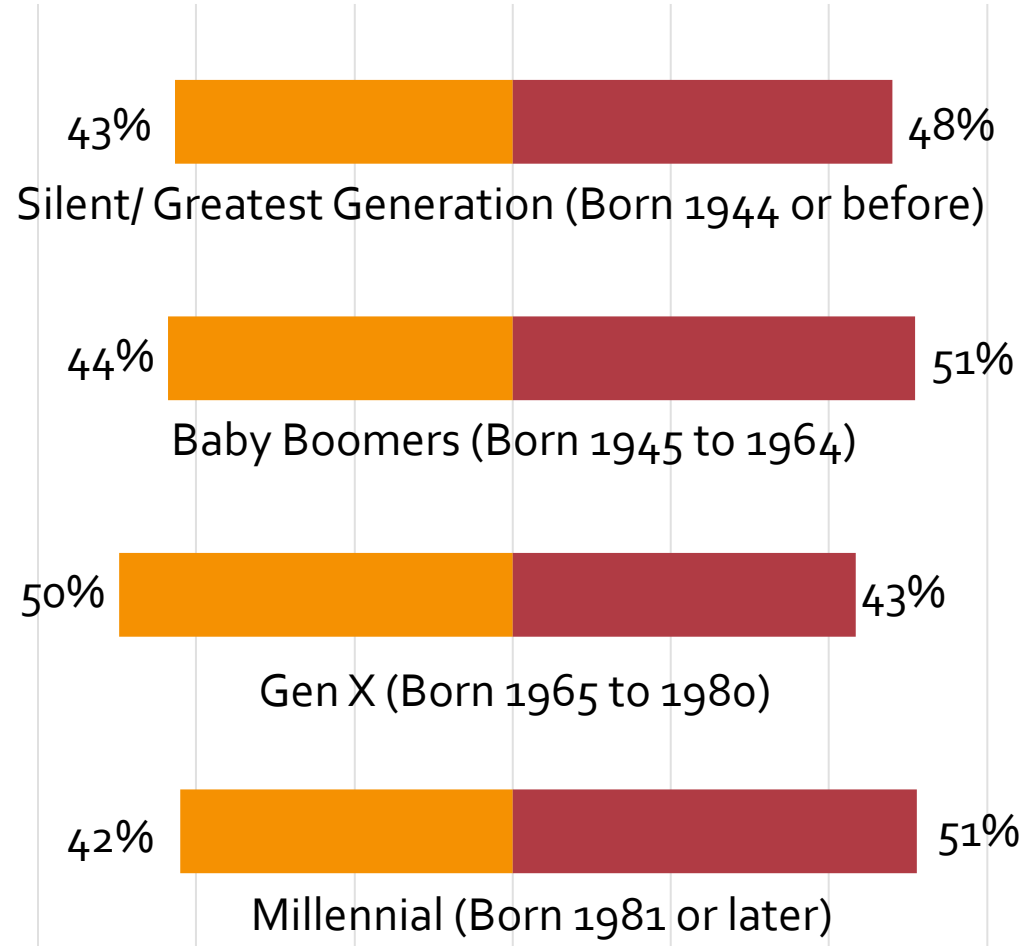
Q17. Imagine for a moment that you are moving to another community. These questions are about the kind of community where you would like to live. Please select the community where you would prefer to live.

Don't Know/Neither

Millennials and Baby Boomers prefer smaller yards in walkable neighborhoods

Community A:
(conventional suburb)
Houses with large yards
and you have to drive to
the places you need to
go.

Q17. Imagine for a moment that you are moving to another community. These questions are about the kind of community where you would like to live. Please select the community where you would prefer to live.

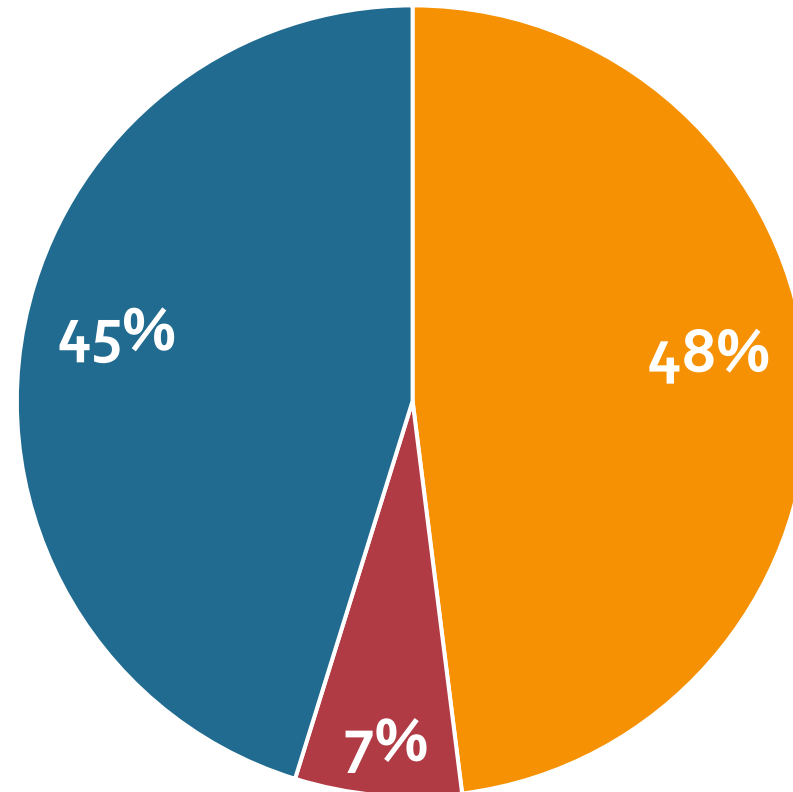


Community B:
(walkable community)
Houses with small yards
and it is easy to walk to
the places you need to
go.

Americans split between attached homes in walkable neighborhoods and detached homes in conventional neighborhoods

Preferred Community

Home A:
(attached, walkable)
Own/rent an apartment/
townhouse, and you
have an easy walk to
shops/restaurants &
have a shorter commute



Home B:
(detached, conventional)
Own/rent detached,
single-family house,
and you have to drive to
shops, restaurants, & have
a longer commute

Q18. Imagine for a moment that you are moving to another community. These questions are about the kind of community where you would like to live. Please select the community where you would prefer to live.

Don't Know/Neither

Millennials prefer attached homes in walkable neighborhoods

Home A:

(attached, walkable)

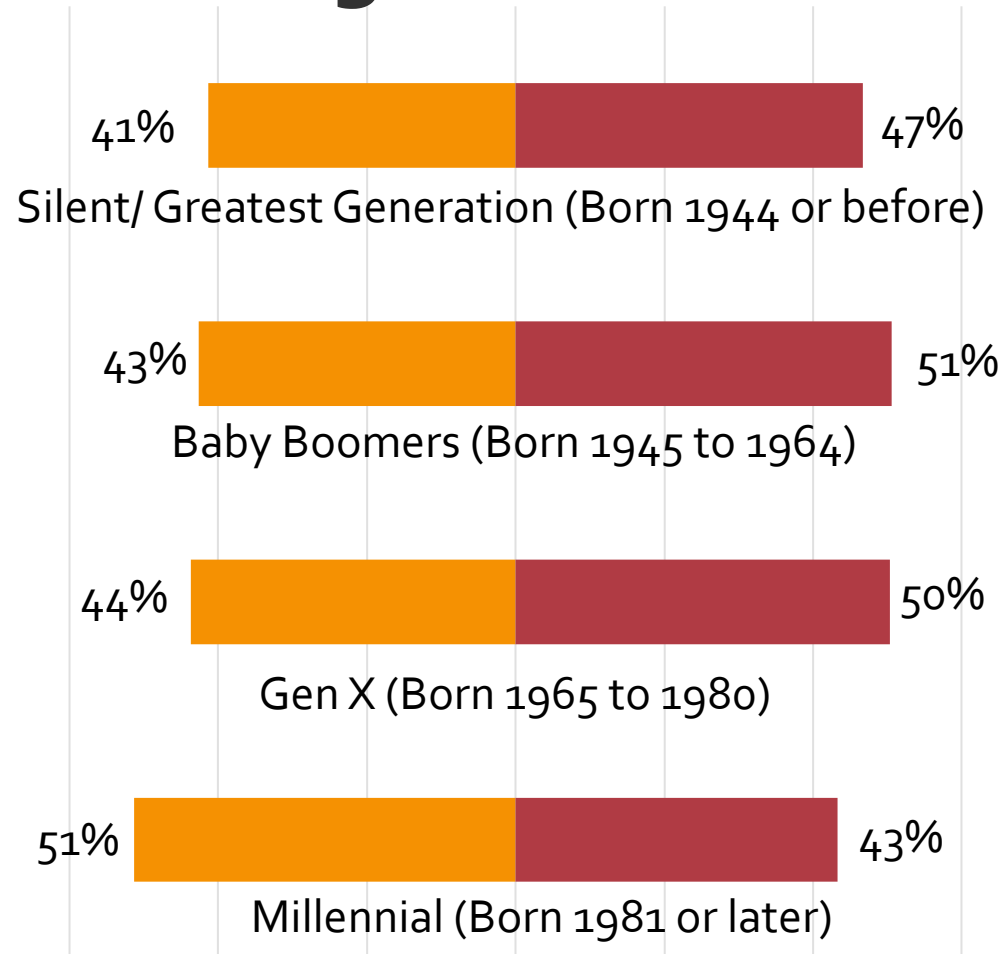
Own/rent an apartment/
townhouse, and you have an
easy walk to shops/
restaurants & have a shorter
commute

Q18. Imagine for a moment that you are moving to another community. These questions are about the kind of community where you would like to live. Please select the community where you would prefer to live.

Home B:

(detached, conventional)

Own/rent detached, single-family house, and you have to drive to shops, restaurants, & have a longer commute



Findings: Current home and neighborhood

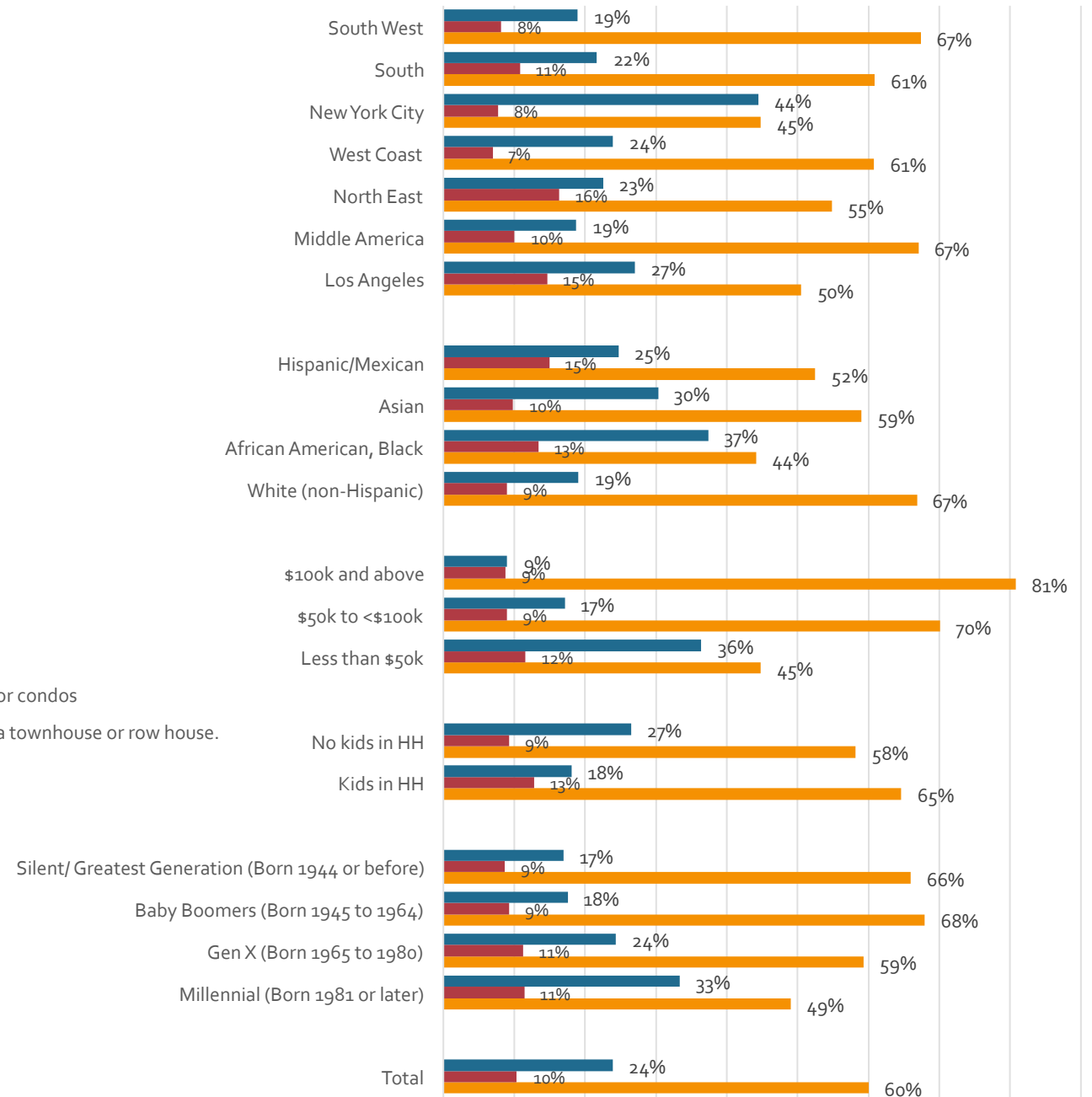
What is the transportation environment where people currently live?
How well does that match their preferences?

Most people live in detached homes

60% of the adults surveyed in the metro areas live in detached, single-family homes.

- A building with 2 or more apartments or condos
- Single family attached house, such as a townhouse or row house.
- Single family detached house

Q9. Do you live in a...



But, 25% live in detached homes and would prefer an attached home in a walkable neighborhood

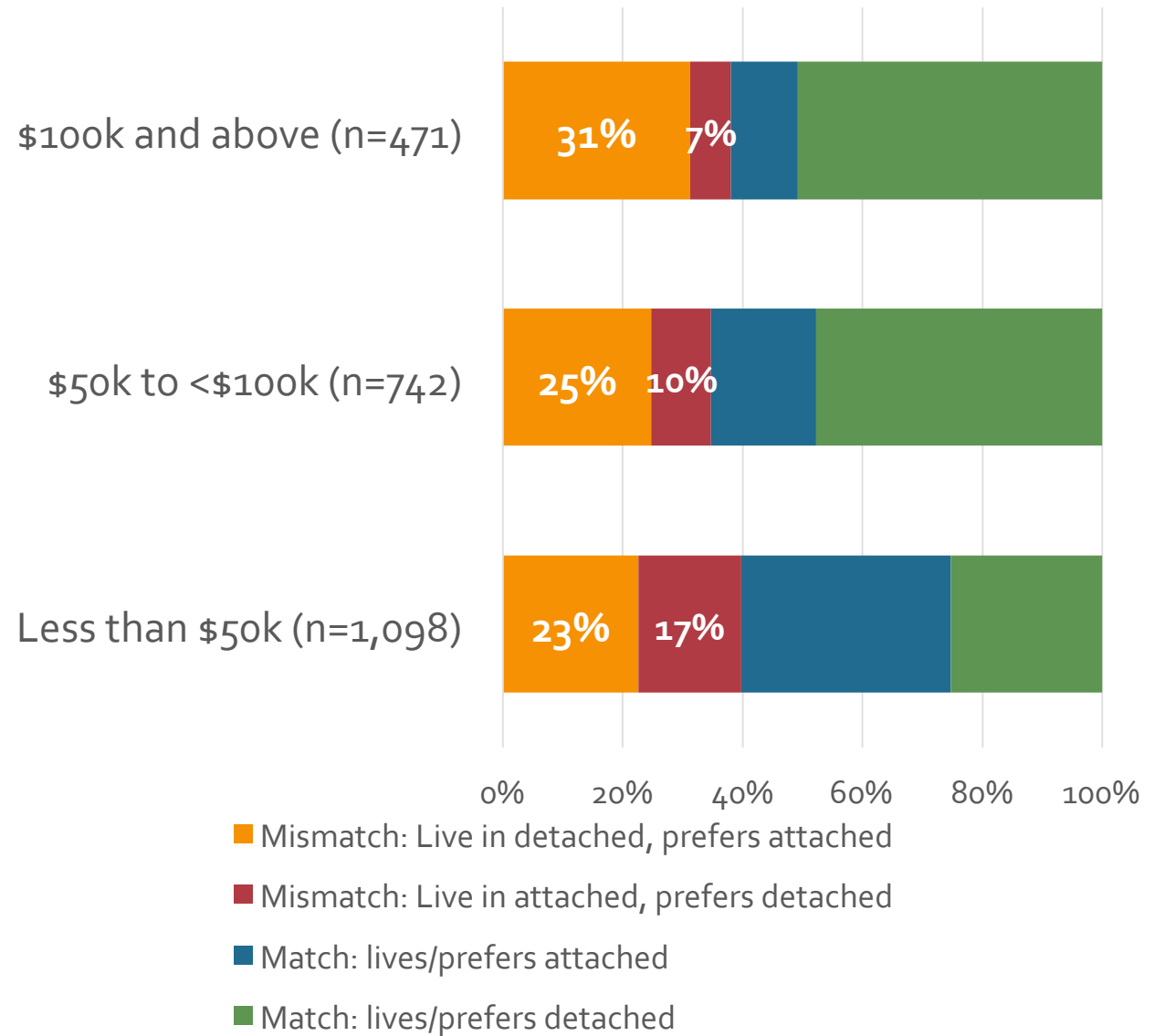
	Lives in	Prefers	%
Mismatched	Detached home	Apartment/townhouse in walkable neighborhood	25%
	Attached home	Detached home in conventional neighborhood	13%
Matched	Attached home	Apartment/townhouse in walkable neighborhood	24%
	Detached home	Detached home in conventional neighborhood	38%

n=2,655; Excludes people living in mobile homes and other housing types

Mismatch differs some by income

People in the highest income level (\$100k and above) are the most likely to be living in detached homes and prefer to live in an attached home in a walkable neighborhood.

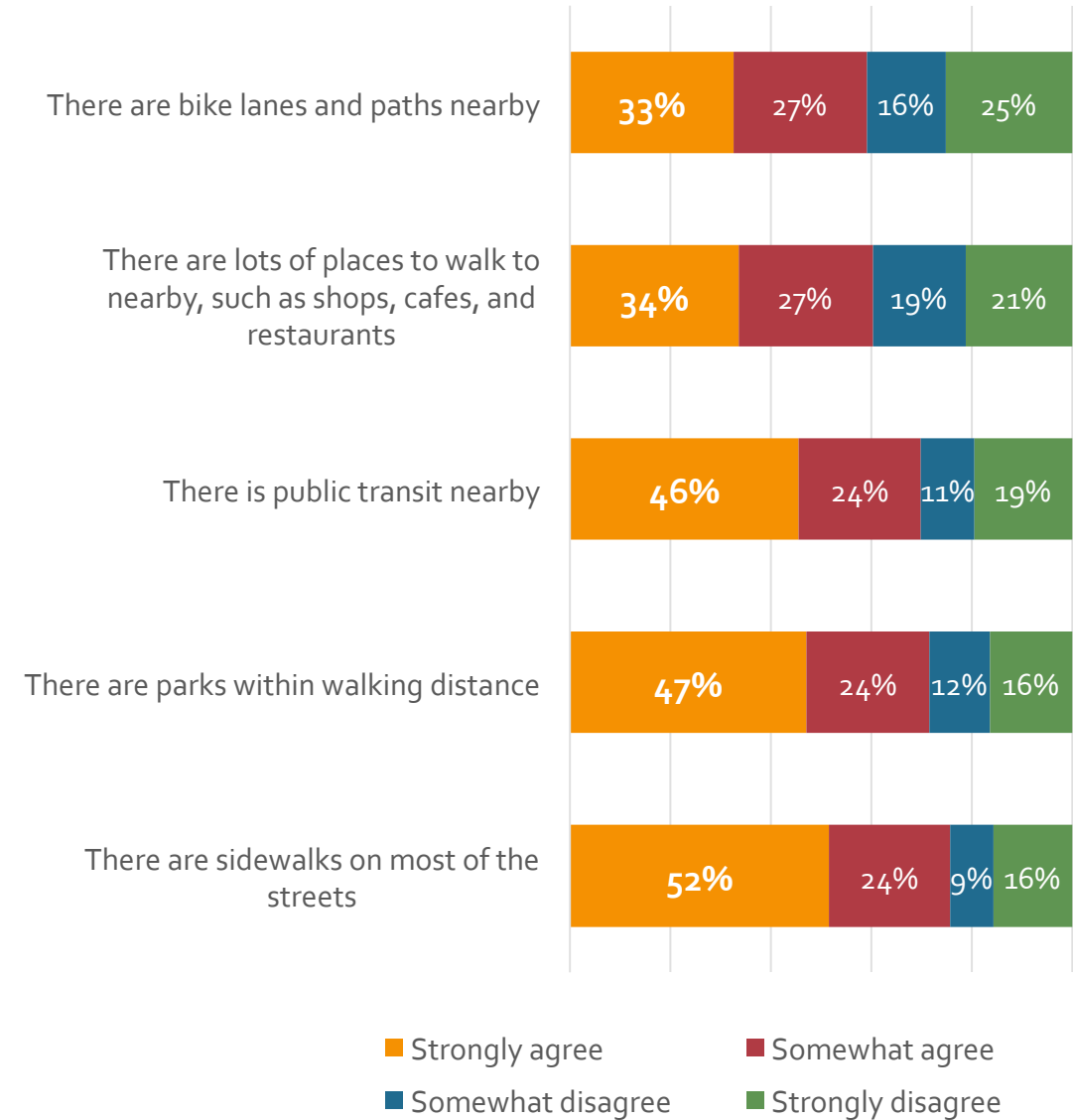
On the other hand, 17% of people in the lowest income group live in an attached home and would prefer a detached home in a conventional neighborhood.



Most people have sidewalks available, but fewer have lots of places to walk to nearby, such as shops, cafes, and restaurants.

Only one-third of people strongly agreed that there are bike lanes and paths nearby.

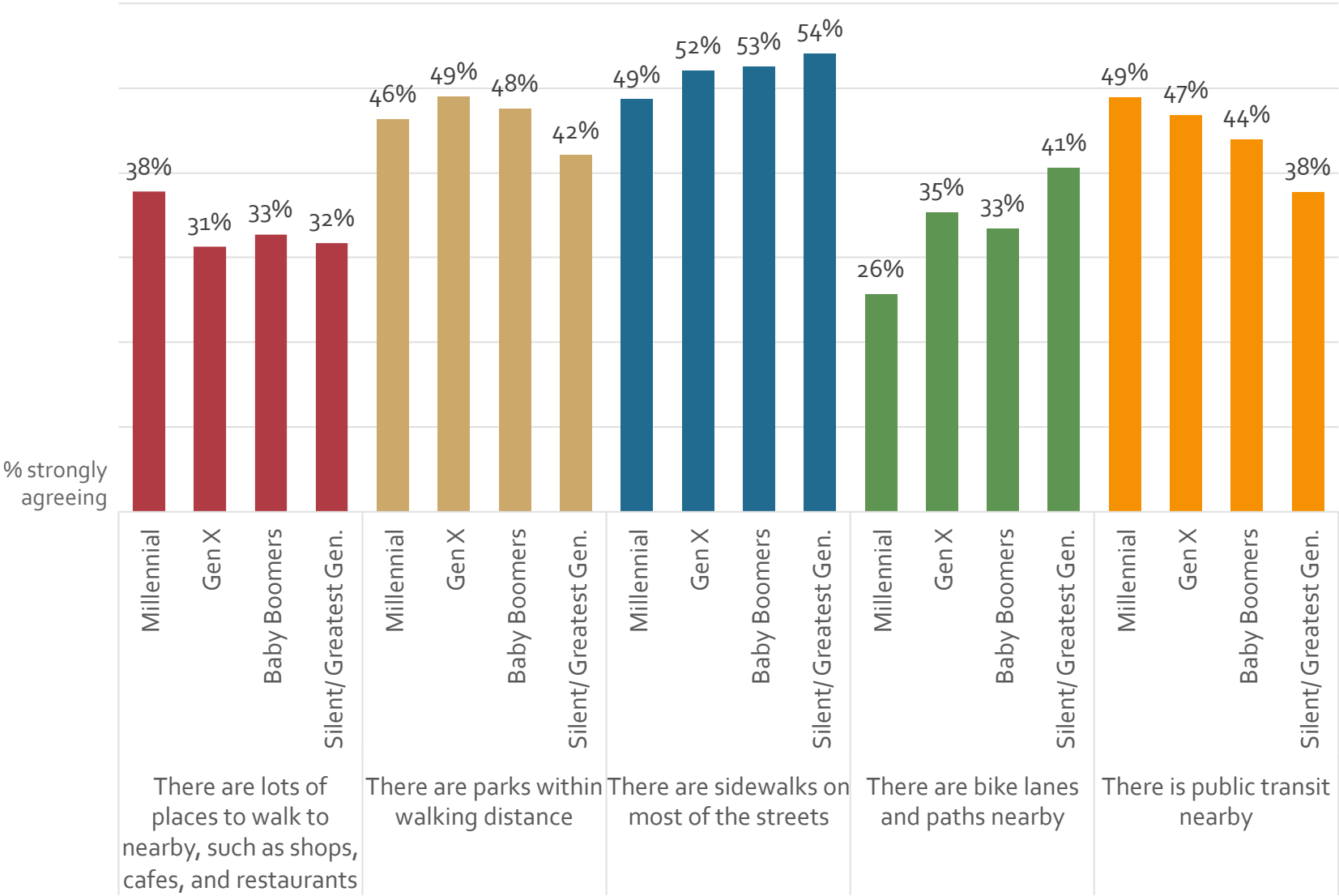
Q4 -8. Now, I have a few questions about your neighborhood and home. For each, please indicate whether you agree or disagree with that statement.



Millennials are living in more walkable, transit-oriented neighborhoods

Millennials were most likely to say that there were lots of places to walk to nearby and public transit, but least likely to say that there were bike lanes and paths nearby.

Q4 -8. Now, I have a few questions about your neighborhood and home. For each, please indicate whether you agree or disagree with that statement.



Having places to walk to varies

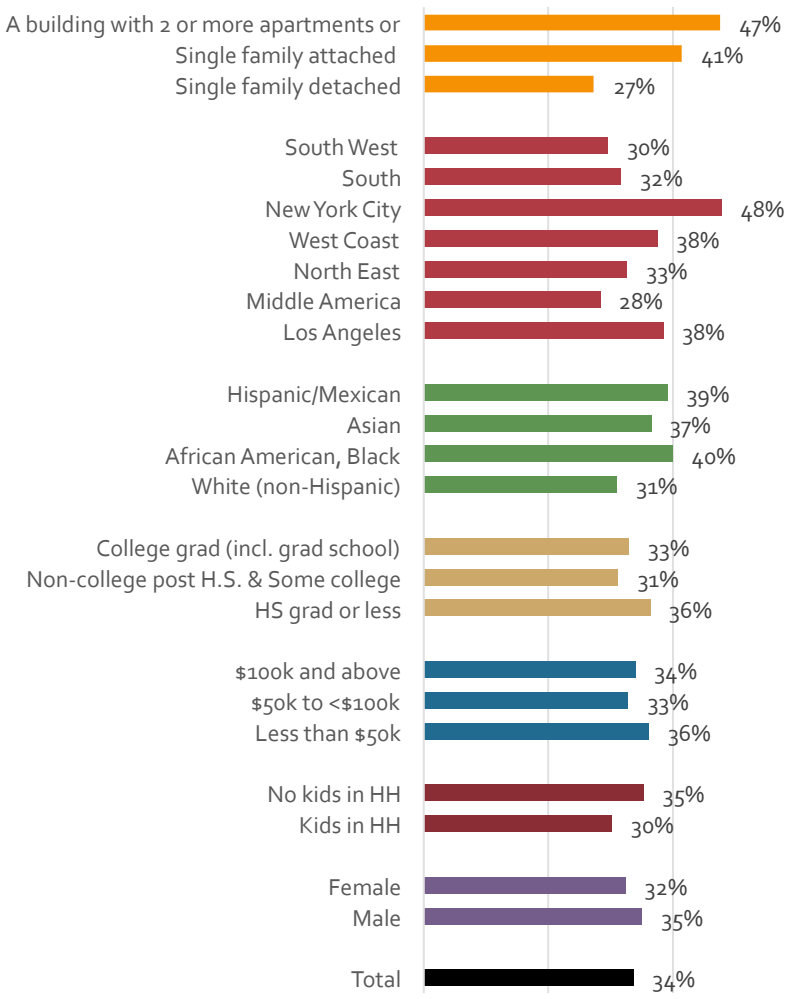
People living in both attached and detached homes felt they had similar access to parks within walking distance, but people in attached homes had better access to shops, cafes & restaurants.

Having parks within walking distance increases with income.

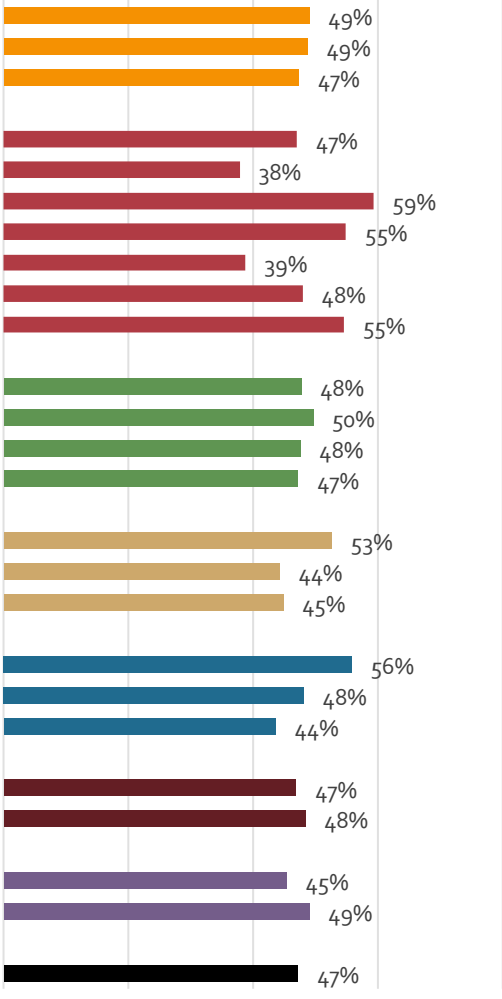
As expected, people in New York City were most likely to agree that there were lots of places to walk to nearby. This was followed by Los Angeles and other West Coast metro areas.

Q4 -8. Now, I have a few questions about your neighborhood and home. For each, please indicate whether you agree or disagree with that statement.

There are lots of places to walk to nearby, such as shops, cafes, and restaurants



There are parks within walking distance



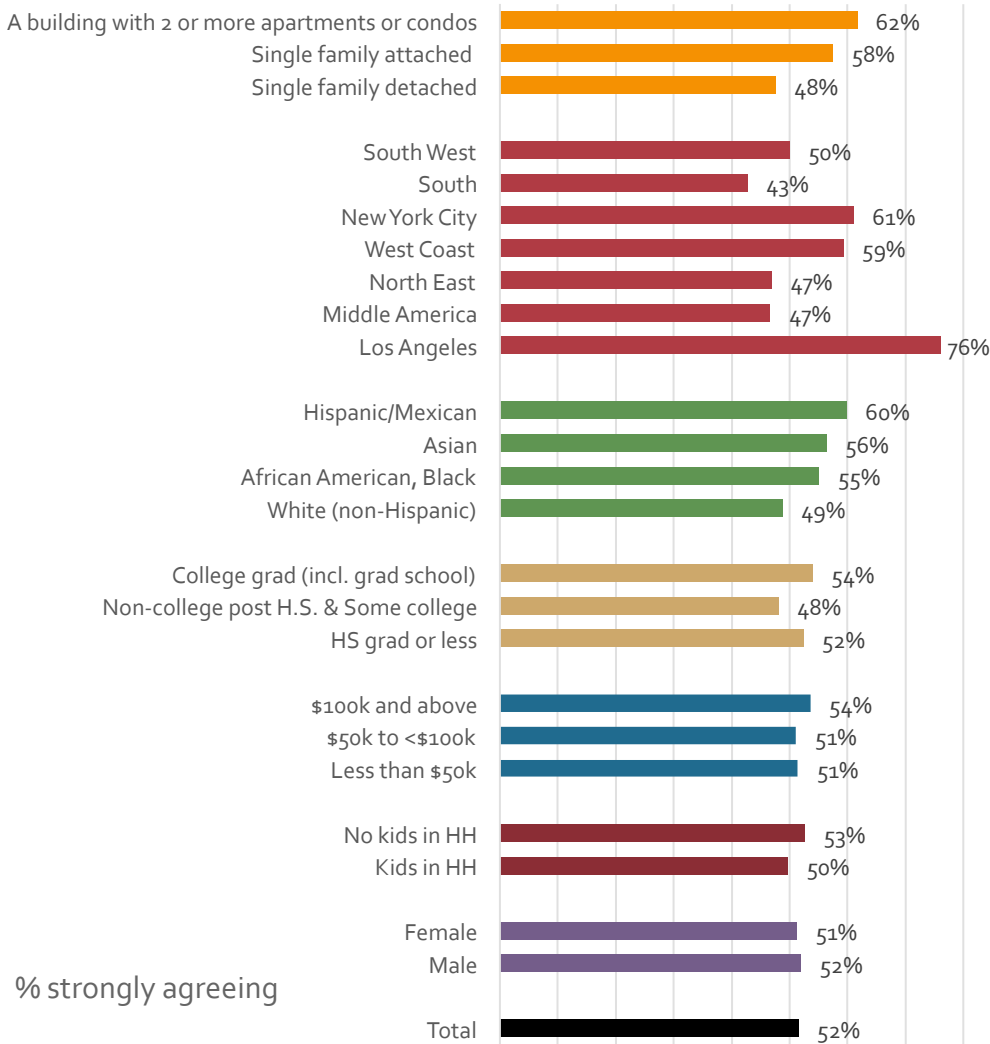
Access to sidewalks vs. bike lanes/paths

Los Angeles and the other West Coast metro areas lead in residents indicating they have bike lanes and paths near their homes.

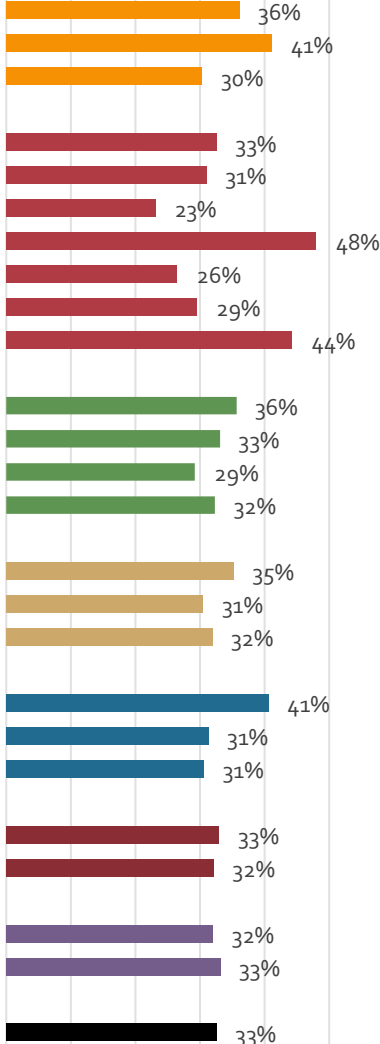
All income groups have about equal access to sidewalks, but higher income residents were more likely to say they have bike lanes/paths nearby.

Q4 -8. Now, I have a few questions about your neighborhood and home. For each, please indicate whether you agree or disagree with that statement.

There are sidewalks on most of the streets

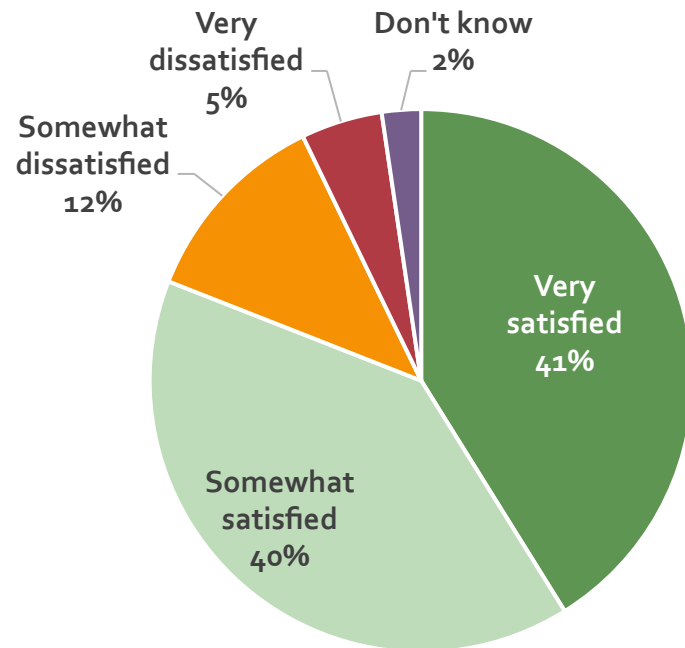


There are bike lanes and paths nearby

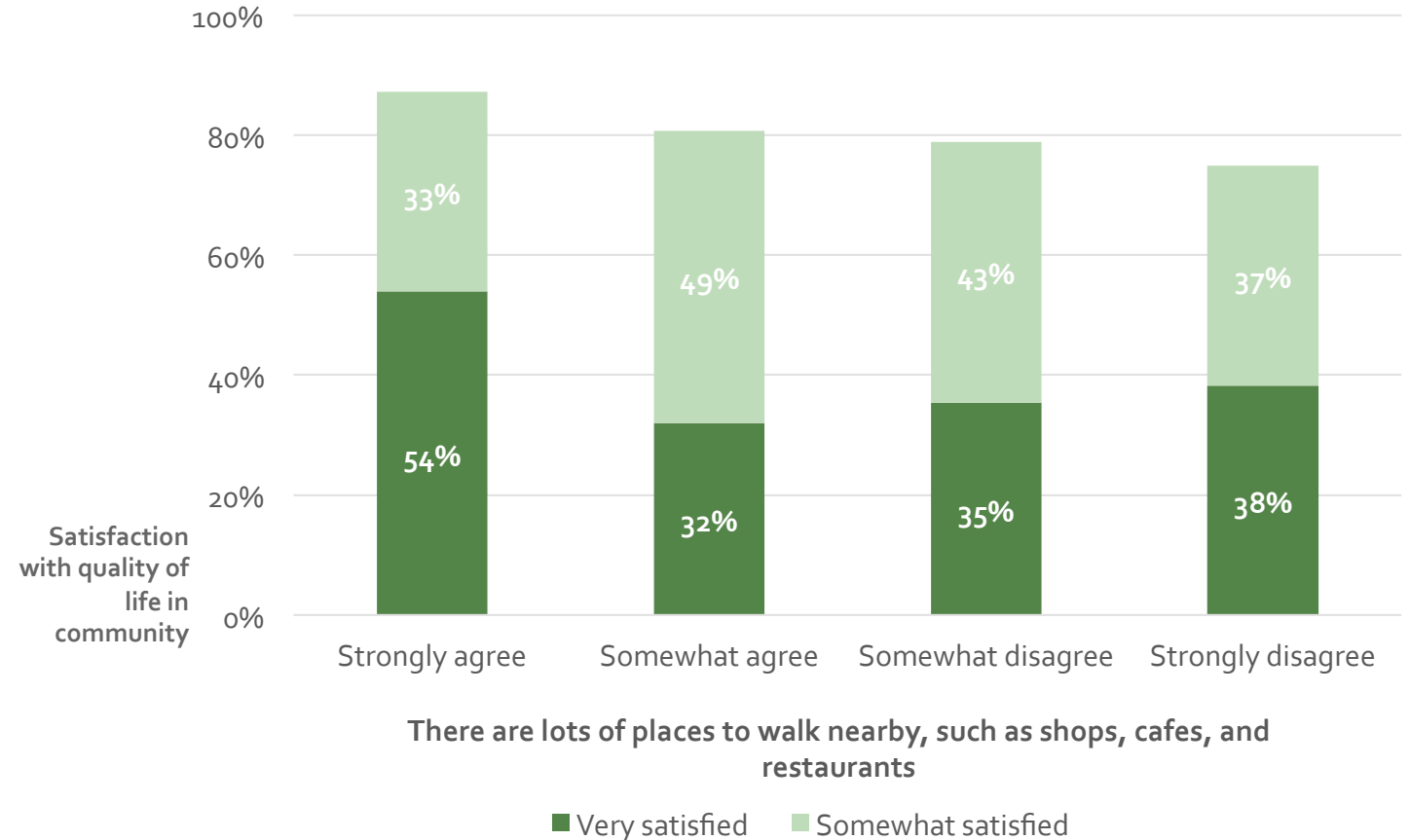


People with places to walk to are more satisfied with the quality of life in their community

Quality of life in your community
(all respondents)



Q3. Would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the quality of life in your community?



Acknowledgements

- The research was conducted by the National Association of Realtors® and Portland State University, with additional funding from the National Institute for Transportation and Communities.
- Project team:
Jennifer Dill and Nathan McNeil, Portland State University
Joe Molinaro and Hugh Morris, National Association of Realtors®
Joe Goode, American Strategies

Methodology: Phone sample

American Strategies designed and administered the telephone survey conducted by professional interviewers. The survey reached 1000 adults, age 18 or older and was drawn from a sampling frame of the top 50 US Census designated Metropolitan Statistical Areas . The survey was conducted May 11-17, 2015.

Telephone numbers were generated by a random selection of adults. One third of respondents were reached on wireless phones. The data were weighted by age and education to ensure an accurate reflection of the population. The sample size with these weights applied is 1000.

In interpreting survey results, all sample surveys are subject to possible sampling error: that is, the results of a survey may differ from those which would be obtained if the entire population were interviewed. The size of the sampling error depends upon both the total number of respondents in the survey and the percentage distribution of responses to a particular question. For example, if a response to a given question to which all respondents answered was 50%, we could be 95% confident that the true percentage would fall within plus or minus 3.1 percentage points of this percentage or between 46.9% and 53.1%.

Methodology: On-line sample

YouGov interviewed 2126 respondents on-line who were then matched down to a sample of 2000 to produce the final dataset. The respondents were matched to a sampling frame of the top 50 MSAs on gender, age, race, education, ideology, and political interest. The frame was constructed by stratified sampling from the full 2010 American Community Survey (ACS) sample with selection within strata by weighted sampling with replacements (using the person weights on the public use file). Data on voter registration status and turnout were matched to this frame using the November 2010 Current Population Survey. Data on interest in politics and party identification were then matched to this frame from the 2007 Pew Religious Life Survey. The matched cases were weighted to the sampling frame using propensity scores. The matched cases and the frame were combined and a logistic regression was estimated for inclusion in the frame. The propensity score function included age, gender, race/ethnicity, years of education, ideology, region, and voter registration status. The propensity scores were grouped into deciles of the estimated propensity score in the frame and post-stratified according to these deciles.